

# Agenda

## Tourism Board Regular Meeting (Rescheduled)

5:30 PM April 10, 2024

Board Meeting Room, Town Hall Annex, 105 E. Corbin St.



1. **Call to order**
2. **Agenda changes and approval**
3. **Presentations**
  - [A.](#) Alliance Contract Renewal for FY25 (Hillsborough Visitors Center Operations)
  - [B.](#) Burwell School Contract Renewal for FY25 (Visitors Services & Operations)
  - [C.](#) Chamber of Commerce Contract for FY25 (Hillsborough Holiday Parade and Tree Lighting)
  - [D.](#) Hillsborough Arts Council Contract Renewal for FY25 (Visitors Services & Events)
  - [E.](#) OC Historical Museum Contract Renewal for FY25 (Visitor Services & Operations)
4. **Discussion items**
  - [A.](#) Draft FY25 Tourism Board Budget
5. **Monthly reports and comments**
6. **Adjournment**

Interpreter services or special sound equipment for compliance with the Americans with Disabilities Act is available on request. If you are disabled and need assistance with reasonable accommodations, call the Town Clerk's Office at 919-296-9443 a minimum of one business day in advance of the meeting.

101 E. Orange St., PO Box 429, Hillsborough, NC 27278  
919-732-1270 | [www.hillsboroughnc.gov](http://www.hillsboroughnc.gov) | @HillsboroughGov  
[www.visithillsboroughnc.com](http://www.visithillsboroughnc.com) | @HillsboroughNC



**STAFF REPORT**  
Hillsborough Tourism Board  
April 10, 2024

**PRESENTER/INFORMATION CONTACT**

Tourism Program Manager, Shannan Campbell

**ITEM TO BE CONSIDERED**

**Subject:** Alliance Contract Renewal for FY25 (Hillsborough Visitors Center Operations)

**Attachments:**

1. Alliance Contract Response and Budget
2. Alliance Budget Justification Forms

**Background:**

The Tourism Program has contracted with the Alliance to run the Hillsborough Visitors Center since the early 1990s. As the Tourism Program has grown the Alliance has taken on marketing duties, including assisting with the administration of the Tourism Program's social media presence and updating the VisitHillsboroughNC.com website, providing input and design on new rack cards, and the official visitors map.

**Summary, key points, and questions:**

- The Alliance is asking for \$250,676 in FY25, a \$21,507 increase over the FY24 contract amount of \$229,169.
- Budget Justification Forms are included explaining expanded needs in the following budget lines:
  - Overhead (rent and utility increases) \$2,060
  - Personnel (cost of living adjustment and healthcare coverage) \$5,968
  - Admin/Operations (software, bookkeeping, staff attendance at 2025 Visit NC conf) \$1,200
  - Maintenance (grounds, cleaning, pest control, restroom supplies) \$3,038
  - Programs (increase cost of map/rack card/1pager printing and water for tours) \$2,000
  - Marketing (increase for more social media collaborations, print, radio, and native ads) \$7,340

**Staff recommendation and comments:**

None. There's a slight discrepancy between the totals in budget justifications (\$21,606) and increase amount from FY24 (\$21,507). The Alliance was able to reduce funds needed in other line items for a savings of \$99.



## FY 2024 Contract Scope of Work Response

### The Alliance for Historic Hillsborough - Visitor Services & Events

<b>Organization Information</b>		
Organization Name: The Alliance for Historic Hillsborough		
Contact Person and Title: Amanda Boyd, Executive Director		
Contact Person Email: Director@historichillsborough.org	Contact Person Phone: 919-732-7741	
Organization Street Address: 150 E King St		
City: Hillsborough	State: NC	ZIP Code: 27278
Organization's Annual Operating Budget: \$ 305,514 (Scottish Festival year)		
<b>General Contract Information</b>		
Contract Name: Visitor Center Operations		
Month(s) or Date(s) in which Proposal Project/Services will take place: JULY 1 <sup>st</sup> , 2024- JUNE 30th, 2025		
<b>Outline/Overview of Scope of Work</b>		
<p><b>Please explain generally how the organization is going to perform the duties requested in the FY2024 Contract Scope of Work Update during Q1(July-Sept):</b></p> <p>The Alliance for Historic Hillsborough will perform the duties requested in the FY2025 Contract Scope of Work throughout the entirety of the fiscal year. Aside from special events and programs, our activities will not fluctuate from quarter to quarter. We will manage the Visitors Center, ensuring it is open, free to the public, and staffed with paid personnel and well-trained volunteers. We will be open from 10-4 Monday through Saturday and 12-4 Sunday. At the Visitors Center, we will ensure that visitors receive recommendations on things to do, places to eat, where to stay, and any literature and visitor services materials they may need. Staff and volunteers will answer inquiries in person, via phone, email, mail, or digital and social media. We will work with Tourism Board staff to stock, promote, and manage the Hillsborough Visitors Center gift shop.</p> <p>The Alliance will also work with Tourism Board staff to implement an active tourism marketing program. We will develop an annual tourism marketing plan that will include a variety of print and digital media, collaborate with the Chapel Hill/Orange County Visitors Bureau on relevant marketing campaigns, and maintain the tourism website and appropriate social media channels. Our work will also involve publishing a monthly e-newsletter, highlighting tourism-related events and special programs, and creating a monthly calendar of events for town map kiosks. Staff will continue distributing literature to regional welcome and transportation centers and providing visitor materials to town locations. We will continue to market to and assist groups with itinerary planning, educational programs, and special events to encourage group visitation.</p> <p>Programs to expect in Q1:</p> <ol style="list-style-type: none"> <li>1. Outlander-themed Walking Tours: The Alliance will return the highly sought-after Outlander-themed walking tours to downtown Hillsborough. As seen in previous tours, we will</li> </ol>		

collaborate with local businesses to enhance the tours for attendees. We are planning one tour per month in Q1.

2. Outlandish Hillsborough Scottish Festival September 28th: The Alliance is again partnering with Ayr Mount to bring the Outlandish Hillsborough Scottish Festival. Learning from the success of the 2019 Festival, the Alliance plans to host various activities at both the Dickson House and Ayr Mount while collaborating with local businesses in all areas of Hillsborough.
3. As part of our heritage education initiatives, the Alliance is working with the Telling the Full Story committee to outline a speaker program to spread awareness of the site and oral histories in the schools and senior centers. We are also outlining the next phase of oral history collection and other initiatives to expand this part of our mission.
4. The Alliance is excited to roll out our West Hillsborough History Walking Tour. In addition to our already popular downtown History Walking Tour and Haunted Hillsborough's Churton Street Stroll, the Alliance has worked with community members of West Hillsborough to develop a walking tour that focuses on the businesses and stories of the western side of town.

**Please explain generally how the organization is going to perform the duties requested in the FY2024 Contract Scope of Work Update during Q2 (Oct-Dec):**

Programs for Q2:

1. The Alliance will again partner with the Orange County Players to host the Spirits of Hillsborough tours in October.
2. We will host Santa this December and lend marketing support to the Hometown Holiday efforts, Small Town Saturday, and the Holiday Parade.
3. As a participating organization in the state's A250 programming, we are actively seeking grant funds for potential projects that would take place or begin production in Q2.
4. The Alliance is also helping to coordinate a panel discussion among collaborating area entities to present at the 2024 Preservation North Carolina Conference with our focus on highlighting the oral history project of Telling the Full Story. While these efforts do not impact tourism directly, they allow us to showcase Hillsborough in a different scope and connect with others who share these initiatives, impacting potential tourism and other collaborative efforts in the future.

**Please explain generally how the organization is going to perform the duties requested in the FY2024 Contract Scope of Work Update during Q3 (Jan-March):**

Programs for Q3:

1. Continuing our involvement with the state's A250 programming mission, the Alliance plans to utilize Q3 for the second round of grant funding opportunities for local heritage education and/or wayside-finding signage expansion.
2. Our annual Revolutionary War Living History Day will also occur in Q3. With the compliments of the A250 programming, we aim to expand the day's offerings with unique scholarly talks and additional interactive reenactors.
3. While field trips and private group tours remain in much-needed supply, The Alliance looks to partner with school systems to assist with grant funding applications to help cover travel costs.
4. The Alliance will also continue its annual partnership with the OC Library to provide programming for Black History Month.
5. We are pursuing a new guided hike option with a local hiking club. The Alliance would create a script of folktales of the Occoneechee Mountain.

**Please explain generally how the organization will perform the duties requested in the FY2024 Contract Scope of Work Update during Q4 (April-June):**

Programs for Q4:

1. The Alliance hopes to bring back the Preservation Tour again in FY25 during the month of May. We are looking at ways to expand our outreach and drive visitors during slower times with additional interactive events, preservation workshops, and engaging presentations throughout the month.
2. The Alliance will also host Hillsborough Excursion Day during Q4, which is a free community-wide celebration of Hillsborough's past, present, and future.
3. During the month of June, the Alliance will once again partner with the OC Library to offer programming for the Juneteenth Celebrations.

**Outline/Overview of Job Tasks and Schedules**

**Please explain generally how the organization plans to accomplish all goals associated with the scope of work, including but not limited to, marketing, hiring, volunteer recruitment, exhibit development, event tasks, etc.**

The Alliance for Historic Hillsborough will utilize the talents of our dedicated staff and volunteers to see that the goals associated with the scope of work are accomplished.

The executive director will ensure that the Visitors Center is managed in a professional and financially responsible manner. She will supervise the work of all staff and volunteers and ensure that the tasks, as outlined in the contract with the Hillsborough Tourism Board, are fulfilled. She is also responsible for implementing the marketing duties enumerated in the agreement, specifically handling all social media and website responsibilities. She will work to develop and implement a tourism marketing plan using digital and print media and will be responsible for producing a monthly e-newsletter and kiosk calendar. She will also be responsible for creating and distributing press releases and creating content as needed.

The program and development director will implement all special programs and events. She will work to recruit and train volunteers and will develop new exhibits and programming experiences for visitors.

Our site coordinator will maintain the visitor center's grounds, public restrooms, and historic Dickson House/Office. He will also be responsible for ordering merchandise for the gift shop, supplying literature and visitor materials to other visitor displays and locations in the area, and assisting visitors and guests with whatever they might need when they visit Hillsborough. This position helps to oversee weekend staffing and works with the executive director to implement marketing initiatives when required.

All staff will be responsible for greeting visitors and providing general information.

**Please explain how the organization is going to fundraise and build sustainability in FY25:**

The Alliance works to support and sustain our mission in a variety of different ways each year. For FY25, we have planned for the following

- A250 programming grant funding from the state
- Grant funding for programming from the Orange County Outside Agency department
- Income from historic walking tours, collaborative Outlandish walking tours, Preservation Tour, Spirits' Tours
- Historic Walking Tour booklet sales
- Outlandish Hillsborough Scottish Festival Ticket Sales
- Field Trip income

Because of our organization's composition, we do not currently require fiscal giving from our board members and work diligently to find ways to generate income without interfering with donors or the giving campaigns of our partners. Our goal for FY25 and FY26 is to find grant funding opportunities to support our larger initiatives while developing a secondary fundraising path that complements other area organizations we collaborate with.

**Please explain how the organization plans to grow tourism in Hillsborough in FY25:**

- Operate the Hillsborough Visitor Center
- Distribute and restock information and town maps to local and NC area businesses and organizations
- Co-lead the Visit Hillsborough Social Media campaigns
- Co-lead the advertising and marketing plan for Visit Hillsborough
- Find unique opportunities for marketing collaboration to targeted audiences (targeted audiences are selected by website and social media data analytics)
- Utilize Alliance-led programs to better showcase all of Hillsborough and reach new demographics - Rev War Day, Excursion Day, Outlandish Hillsborough Scottish Festival, A250 collaborations
- Co-lead the upkeep of the Visit Hillsborough Website and landing pages
- Partner with the Chamber to assist in the Merchant Association initiatives and programs
- Work with local businesses and organizations to continue to identify community needs within the scope of Visit Hillsborough
- Continue to pursue unique partnerships with outside organizations that align with our Alliance goals but also impacts Hillsborough's reach (NC Historical Museum, Sassenech Tours, MOHA, PNC, Preservation Durham)

**Marketing Plan**

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q1(July-Sept):**

\*\*\*Below is a draft outline of the proposed PAID FY25 marketing plan. This year's plan was developed after careful consideration of marketing analytics from past marketing campaigns. You will notice that each quarter hits a print, social media, and radio element. Alongside the paid marketing outline is The Alliance's weekly duties to advance our social media platform (2-3 postings per week), creation of the monthly kiosk signs, and designing & sending of the monthly digital newsletter.

Visit Hillsborough Q1 Marketing draft:

	WHUP	Radio	Seasonal Ads
July	Triangle Weekender	Print/Digital	18 months (ends April 2025) with two giveaways, 3 featured bundles, featured directory listing
July/Aug/Sept	Chapel Hill Chamber Map	Print	General Ad - TDA
Aug/Sept	Influencer	Social Media	Collaboration/event
September	Durham Mag	Social Media	Giveaway #2 Triangle Weekender
August/September	WUNC	Radio	Fall Ad
August/September	Out & About WRAL	TV	Fall Ad
August/September	Sponsored Bump	TV	

Alliance Marketing Q1:

The majority of the Alliance's marketing and promotion focus will be placed towards the Scottish Festival. We are looking to reach unique markets that have a shared interest, including;

- Wilmington
- New Bern
- Tryon Palace
- Charlotte
- Boone
- Blowing Rock

As well as doing paid collaboration ads with Scottish heritage organizations; SCOT, Mystic Brewing, Tartan Museum, and more. We will also be working with Durham Magazine for a social media giveaway collaboration including an overnight stay at the Colonial Inn and two tickets to the Festival.



**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q2 (Oct-Dec):**

Visit Hillsborough Q2 Draft

	WHUP	Radio	Seasonal Ads
October	Durham Magazine	Print	Visitors and Relocation Guide
October	Mebane newcomers Mag	Print	Womack/News of Orange 1/2 page ad
November	Chapel Hill Magazine	Print	Visitors and Relocation Guide
December	Influencer	Social	Holiday getaway with winter activities
December	WUNC	Radio	Holiday Ad

Alliance Q2 Marketing

In addition, the Alliance will be promoting our Spirits' Tour and Santa events via Social Media marketing, free community calendar listings, and partnering locations (area libraries, universities, collaborative groups, etc.)

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q3 (Jan-March):**

Visit Hillsborough Q3 Draft: Q3 is typically a slower marketing and advertising period until the middle of March. This is typically when the Alliance looks to plan the next fiscal year's ventures, obtain pricing changes for larger-scaled advertising venues, and strategize social media tactics.

	WHUP	Radio	Seasonal Ads
February/March	Print/Digital		Feature of Occaneechee Village
March	WUNC	Radio	Spring Ad

Alliance Q3 Marketing: January and February are the perfect time for the Alliance to reach out to area schools and groups to schedule upcoming field trips and private tours. We also develop the upcoming walking tour schedule with our guides and promote said tours. In preparations for Rev War Day, usually our kick-off season event, the Alliance will be going to seek out free or reduced cost advertising options with local partners for that and other upcoming events.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q4 (April-June):**

Visit Hillsborough Q4 Draft:

	WHUP	Radio	Seasonal Ads
April	Triangle Weekender	Print/digital	
April	Durham Mag	digital	eat and drink HB giveaway Triangle media
April/May	Influencer	Social Media	collaboration for weekend stay
April/May/June	Our State or Other	Print/digital	Highlight Occaneechi Village/outdoor rec
April/May	WUNC	Radio	Summer Ad

## Detailed Proposed Budget

a. Item	b. Amount Needed via Contract Funding in FY23 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	
i.e., Personnel Costs- .5 FTE- Part Time Coordinator (10 hours p/w)	Ex: \$6,500	Ex: \$1,000	Ex: \$500	Non-profit Grant	\$8,000
<b>1. Overhead</b>					
Rent	\$10,570	\$3,120 AHH	\$		\$13,690
Utilities					
Phone/Internet					
<b>2. Personnel</b>					
85% ED salary and health insurance					
100% Program Coordinator salary and health insurance	\$160,356	\$9,328	\$		\$169,684
100% Communications and Visitor Services Coordinator salary					
100% retirement benefit for full-time employees (0)					
Cell phone Stipend					
<b>3. Programs</b>					
Visitor Services	\$9,700	\$1000 AHH	\$37,000	Sponsors & grants for the Scottish Festival	\$47,700
Rev War Day & Excursion Day					
<b>4. Replica Village</b>	\$10,000	\$0	\$	County funds maintenance	\$10,000
<b>5. Marketing</b>	\$30,000	\$500 AHH	\$		\$30,500
<b>6. Captial Expenses</b>	\$0	\$0	\$		\$0

<b>7. Admin/Operations</b>					
Cc processing fees					
Due/subscriptions					
Insurance	\$16,100	\$ 2,890 AHH	\$		\$18,990
Office Supplies					
Professional Development					
Professional Fees					
Software & Tech					
<b>8. Maintenance</b>					
Building					
Grounds	\$13,950	\$0	\$		\$13,950
Cleaning					
Pest Control					
Public Restrooms					
<b>TOTALS</b>					
(sum of each column)	\$250,676	\$16,838	\$37,000		\$304,514

\*\* PLEASE ADD ROWS AND/OR PROVIDE ADDITIONAL SHEETS IF THERE IS NOT ENOUGH ROOM TO ACCOMMODATE YOUR FULL BUDGET \*\*

## Signatures

I hereby certify that the information contained in this proposal is true and accurate to the best of my knowledge and that I have reviewed the Town of Hillsborough's Non-profit Guidelines and our organization is in compliance.

EXECUTIVE DIRECTOR

Signature: *Amanda Boyd*

Date: 3.14.2024

Printed Name: Amanda Boyd

BOARD CHAIRPERSON

Signature: *Megan Kimball*

Date: 3/18/2024

Printed Name: Megan Kimball

GRANT CONTACT PERSON (if different than Executive Director)

Signature:

Date:

Printed Name:

## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: We request an increase in funds used towards the **Personnel** cost of living adjustment in salaries and health care coverage.

FY24 Funding =\$154,387.98

FY25 Request = \$160,356

**Difference = \$5,968.02**

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

2. Salaries = The requested amount reflects this year's suggested COLA.

2. Payroll taxes = The requested increase reflects the payroll taxes that match that of the salary request.

1. Health Care Coverage = The increase request reflects the FY25 cost of health care coverage for two full-time staff and a portion of the executive director. The Alliance covers the remaining portion of ED coverage.

Line-item where funds are requested (number from budget and description of line-item):

Salaries: Requesting \$130,323 (FY24 \$125,339.50)

Payroll: Requesting \$9,970 (FY24 \$9,588.48)

Health Care Coverage: Requesting \$18,263 (FY24 \$15,600)

Describe request:

Salaries:

Site Coordinator: \$18 per hour (\$35,100)

Weekend Visitor Services: \$17.65 (OC Living Wage Approved) - (\$9,178)

Program Coordinator (salary): \$42,000

Executive Director (salary): \$44,045 (Alliance to cover remaining)

Payroll Tax: Reflects salary increase request.

Health Insurance Coverage

Site Coordinator: \$6408

Program Coordinator: \$6408

Executive Director: \$4806 (Alliance cover the rest)

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

All requests directly affect the operations of the Hillsborough Visitor Center.

Alternatives & impact if request is not funded:

Salaries: If additional funding is unavailable for salaries, the Alliance can offer current employees the same salary for FY25. However, we must brainstorm the sustainability of lower-paid employees and adjust job expectations accordingly.

Healthcare coverage: We currently offer healthcare coverage for all full-time employees. If this is no longer funded, we must reduce the number of full-time staff.

Additional information:

Include any pertinent information that wasn't already covered about the request.

## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: We request an increase in funds used towards the **Program** line item, which includes visitor services, volunteer management, and marketing

FY24 Funding =\$17,700

FY25 Request = \$19,700

**Difference = \$2,000**

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

1. Visitor Services: We are requesting an increase in visitor services to cover the costs of the additional printing of town maps and one-sheet information handouts.

2. Volunteer Management: As we increase the number of weekend tours offered, we are asking for additional money to help cover the cost of water for our volunteer guides.

Line-item where funds are requested (number from budget and description of line-item):

Visitor Services: Requesting \$6,000 (FY24 \$4,100)

Volunteer Management: Requesting \$200 (FY24 \$100)

Describe request:

Visitor Services: printing costs for town maps and information handouts. We currently order 2,500 town maps every six months and resupply information handouts each quarter.

Volunteer management: Water for volunteer guides

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

All requests directly affect the operations of the Hillsborough Visitor Center.

Alternatives & impact if request is not funded:

Visitor Services: Limit ordering maps and materials to that of the agreed-upon funding amount.

Volunteer Services: Seek alternative methods for volunteer support.





## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: We request an increase in funds used towards the **Marketing** line item, which includes visitor services, volunteer management, and marketing

FY24 Funding =\$22,660

FY25 Request = \$30,000

**Difference = \$7,340**

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

2. Marketing: We highly encourage an increase in tourism marketing funds. As we better understand our current audience and venture to reach new target markets, the Alliance encourages a more diverse approach to the FY25 advertising plan. Investments are set to include consistent social media collaborations, print, radio, TV, and native ads. As in all other areas, marketing costs have continued to rise. The previous FY24 estimate of costs was too conservative, which led us to request a more appropriate budget for FY25.

Line-item where funds are requested (number from budget and description of line-item):

Marketing: Requesting \$30,000 (Fy24 \$22,660)

Describe request:

See the scope of work for a detailed marketing outline.

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

All requests directly affect the operations of the Hillsborough Visitor Center.

Alternatives & impact if request is not funded:

Marketing: Reduce suggested marketing investments to the agreed-upon funding amount. If funds are limited, the tourism board will also need to outline the suggested goals for our marketing campaign so the Alliance can redirect the focus appropriately.



## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: We request increased funds for the **Overhead** line item due to increased rent and utilities.

FY24 Funding =\$8,510

FY25 Request = \$10,570

**Difference = \$2,060**

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

1. Rent : Per the discussions held in FY2024, Orange County has increased our rent by double for FY25. The amount presented represents the tourism board's portion of the Dickson House rent; the Alliance covers the other portion.

1. Utilities: The cost increase request for utilities reflects the predicted rise in utility expenses for FY25.

Line-item where funds are requested (number from budget and description of line-item):

Rent: Requesting \$3,120 ( FY \$1,560)

Utilities: Requesting \$4,500 (FY24 \$4,000)

Describe request:

The needs of rent and utilities indicate requests.

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

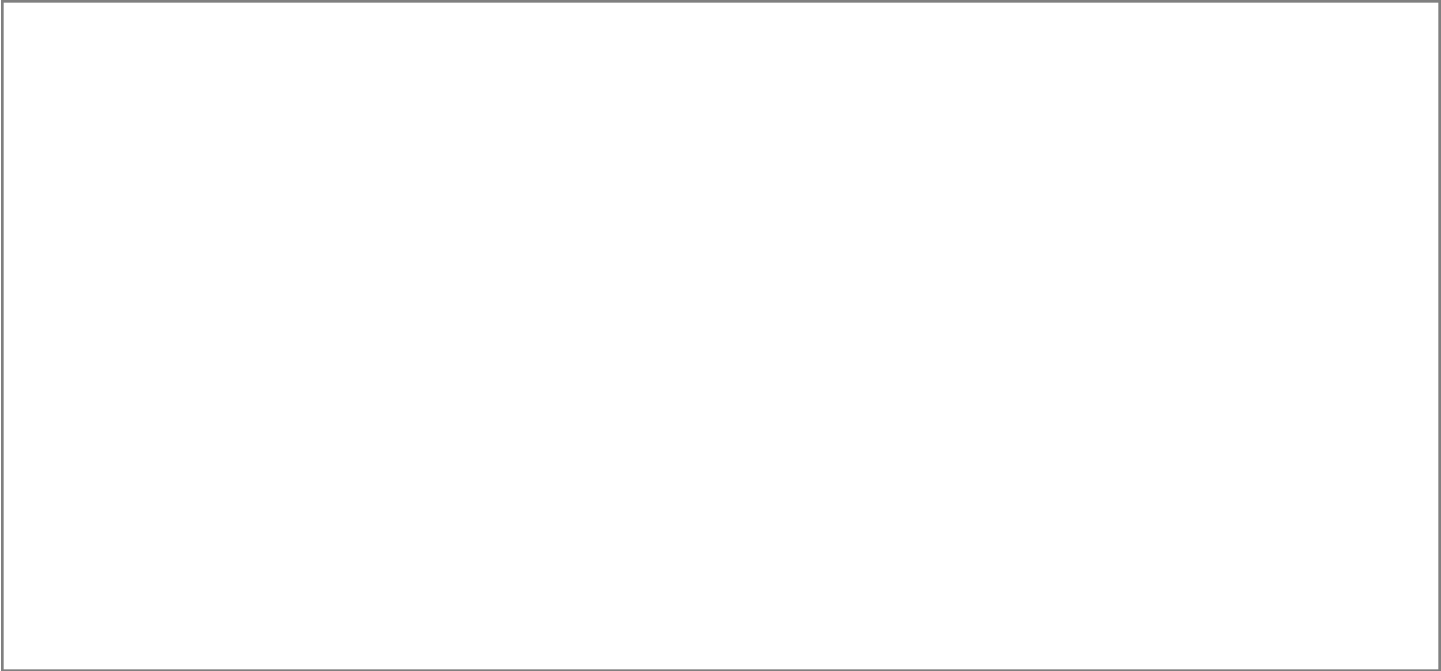
All requests directly affect the operations of the Hillsborough Visitor Center.

Alternatives & impact if request is not funded:

The Alliance does not currently have an alternative suggestion to combat the rising cost of operating overhead. We could, however, reduce our hours of operation to six days a week and shift personnel monies towards this line item.

Additional information:

Include any pertinent information that wasn't already covered about the request.



## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: We request an increase in funds used towards the **Admin/ Operations** line item

FY24 Funding =\$14,900

FY25 Request = \$16,100

**Difference = \$1,200**

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

1. Software/Tech: Increased ask reflects the fees for Intuit Quickbooks and Canva subscriptions.

1. Professional fees: Increased ask reflects the FY2025 rate for CPA, Prime pay, and IT support.

2. Dues: The increased ask reflects fees for Chamber membership, Womack dues, Square Marketing, Zoom, and nonprofit membership renewal.

3. Professional Development: We are asking for an increase in professional development funds to cover the cost of one staff member's attendance at the annual NC tourism conference.

Line-item where funds are requested (number from budget and description of line-item):

Software: Requesting \$1,240 (FY24 \$1,180)

Professional fees: Requesting \$8,700 (FY24 \$8,450)

Dues: Requesting \$2,436 (FY24 \$2,246)

Professional Development: Requesting \$1,000 (FY \$300)

Describe request:

Software fee breakdown: Intuit Quickbooks - \$1080, Canva \$160

Professional Fees: CPA - \$6300, Prime Pay -\$2300, IT support -\$100

Dues: Chamber Membership -\$300, Womack online-\$66, NCnonprofit-\$360, Square Marketing -\$1080, Zoom -\$630

Professional Development: \$1000 Visit NC Conference

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

All requests directly affect the operations of the Hillsborough Visitor Center.

Alternatives & impact if request is not funded:

The requests made for Software and Professional Fees reflect the rates of FY25. Other than looking into alternate companies, the Alliance has no planned alternatives.

Dues and Professional Development can be adjusted to the agreed funding amount.

## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: We are requesting an increase in funds for the **maintenance** needs of the Visitors Center. The request reflects the increased costs of cleaning the Visitor Center and public restrooms, grounds needs, pest control, and public restroom supplies.

FY24 Funding =\$10,912

FY25 Request = \$13,950

**Difference = \$3,038**

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

1. Grounds: The Garden Club's beautification project is a much-welcomed and needed asset to the Visitors Center, but with their generosity comes a much more in-depth maintenance plan. We have worked with the GC and current gardener to outline the costs associated with caring for the new indigenous plants, including increased watering, weeding, and overall seasonal care.

2. Cleaning Costs: We are requesting a minimal increase for the cleaning of the Visitor Center and public restrooms. This money would go towards supplies for staff and volunteers to clean during high-traffic times of the year. While our weekly cleaners keep the public restrooms in check and can tackle the visitor center bi-weekly, the Spring and Fall event seasons call for additional attention.

3. Pest Control Maintenance: The Visitors Center is contracted with Clegg's Pest Control, which provides quarterly inspections of ants and rodents. While they provide a discount due to our nonprofit status, their fee has been raised slightly.

1. Public Restroom Supplies: We are seeing a significant increase in the need to refill the public restroom supplies from March through November.

Line-item where funds are requested (number from budget and description of line-item):

Grounds: Requesting \$6,000 (FY24 \$3500)

Cleaning: Requesting \$6700 (FY24 \$6480)

Pest Control: Requesting \$250 (FY24 \$232)

Public Restroom Supplies: Requisitioning \$500 (FY24 \$200)

Describe request:



Grounds: Watering, weeding, and landscape care  
Cleaning: Cleaning supplies for the Visitor Center and restrooms  
Pest Control: Quarterly pest inspection  
Public Restroom Supplies: paper towels and toilet paper

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

All requests directly affect the operations of the Hillsborough Visitor Center.

Alternatives & impact if request is not funded:

Grounds: We will need to restructure the extent to what the Hillsborough Garden Club has planned for the landscape renovations and restrict the amount they intend to plant.

Cleaning: Cleaning will remain on its typical schedule of once per week for the public restrooms and bi-weekly for the visitor center.

Pest Control: We could reduce the frequency of the pest checks.

Public Restroom Supplies: We will maintain our current replenishment schedule and close restrooms when unable to restock.

Additional information:

Include any pertinent information that wasn't already covered about the request.





**STAFF REPORT**  
Hillsborough Tourism Board  
April 10, 2024

**PRESENTER/INFORMATION CONTACT**

Tourism Program Manager, Shannan Campbell

**ITEM TO BE CONSIDERED**

**Subject:** Burwell School Contract Renewal for FY25 (Visitors Services & Operations)

**Attachments:**

1. Burwell School Contract Response and Budget

**Background:**

The Tourism Program started contracting with the Burwell School in FY17 to support on-going tours, maintenance, and their continued operation as house museum and tourism destination. In FY23 Burwell School was funded in the amount of \$40,574. In FY24 the Burwell School requested an additional (\$44,426) in funding to expand staffing and attempt to become more self-sustaining, for a total of \$85,000 in FY24.

**Summary, key points, and questions:**

- The Burwell School is asking for \$70,000 in FY25, a \$15,000 decrease over the FY24 contract amount of \$85,000.
- Budget Justification Forms are not included as Burwell is asking for less funds in FY25 than in FY24.

**Staff recommendation and comments:**

None. Burwell indicated that they are going to speak on how the support in FY24 assisted in their goals.



## FY 2025 Contract Scope of Work Response Burwell School Historic Site - Visitor Services & Operations

<b>Organization Information</b>		
Organization Name: Historic Hillsborough Commission (HHC)		
Contact Person and Title: Emma Vadney, Site Director		
Contact Person Email: burwellsc@gmail.com	Contact Person Phone: 919-732-7451	
Organization Street Address: 319 N Churton St		
City: Hillsborough	State: NC	ZIP Code: 27278
Organization's Annual Operating Budget: \$ 158,863.00		
<b>General Contract Information</b>		
Contract Name: Burwell School Historic Site – Visitor Services & Operations		
Month(s) or Date(s) in which Proposal Project/Services will take place: <b>JULY 1<sup>st</sup>, 2024- JUNE 30<sup>th</sup>, 2025</b>		
<b>Outline/Overview of Scope of Work</b>		
<p>The Historic Hillsborough Commission is a non-profit board appointed by – but not funded by – the Governor of North Carolina. The HHC, which celebrated its 60<sup>th</sup> anniversary in 2023, is fully committed to carrying out the tenets of the Scope of Work in the 2024-2025 Tourism Board contract. This action will involve the continued coordinated efforts of HHC members, community volunteers and partners, as well as paid staff dedicated to preserving this historic site for another 60 years and beyond.</p> <p><b>Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q1(July-Sept):</b></p> <ul style="list-style-type: none"> <li>• Visitor Services: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>.</li> <li>• Staffing: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>.</li> <li>• Volunteers: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>.</li> <li>• Marketing: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>.</li> <li>• Budgeting: Continue as detailed in the <u>Outline/Overview of Job Tasks and Schedules</u>.</li> <li>• Events/Exhibits: <ul style="list-style-type: none"> <li>○ <b>July, August, September TBD: Lunch and Learns</b> – Burwell intends to offer these free virtual presentations on local history as a means of reaching our audience during the lazy summer months.</li> <li>○ <b>July 26, August 30, September 27: Last Friday Extended Hours</b> – The Burwell School Historic Site will be offering extended hours and special guided tours in partnership with the Hillsborough Art Council's Last Friday events. These will be free and open to all.</li> <li>○ <b>August TBD: Star Party</b> – Weather-permitting, the BSHS will hold its popular Star Party event on the site's front lawn. We hope to continue our partnership with local groups such as CHAOS and Whit's Custard to offer astronomical education and sweet treats to our guests. The BSHS also hopes to operate a bake sale with all proceeds benefitting the site. This event will be free and open to all.</li> </ul> </li> </ul>		

- **September TBD: Tea with Lee** – Local celebrity author Lee Smith will visit Burwell for a teatime book reading and Q&A session. This event will be ticketed, with all proceeds benefitting the Burwell School.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q2 (Oct-Dec):**

- Visitor Services: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Staffing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Volunteers: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Marketing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Budgeting: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Events/Exhibits:
  - **October: Annual Fund Campaign** – This fundraising campaign will kick off during this month. Led by the Development committee, the campaign will include mailings to commissioners, donors, and visitors. Burwell also advertises the annual fund campaign on our website, social media, and email marketing platforms.
  - **October TBD: Fall Fest** – Although our 2023 Fall Fest was victim to a tropical storm, we plan to build on its relative success and see our vision fully recognized in 2024. We will partner with local vendors, farmers, etc. to offer delicious baked goods, local crafts, fall activities, and more. This event will be free and open to the public.
  - **November 30: Small Business Saturday** – Capitalizing on the success of past years' events, the BSHS gift shop will again partner with our local agencies and small businesses to promote small business and tourism in Hillsborough.
  - **December 3: #GivingTuesday** – This mini fundraising campaign will again be promoted via our website and social media.
  - **December TBD: Hillsborough Holiday Parade** – Burwell is fortunate enough to have the Hillsborough Holiday Parade go right past our front lawn. We successfully operated a cookies and cocoa stand in 2023 in an effort to connect with the community and we intend to repeat this in 2024.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q3 (Jan-March):**

- Visitor Services: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Staffing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Volunteers: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Marketing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Budgeting: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Events/Exhibits:
  - **TBD: Revolutionary War Living History Day** – The BSHS will again participate in the annual town-wide Rev War Day, hosting interpreters such as Camp Flintlock and offering special tours free of charge to all visitors.
  - **February TBD: Black History Month Programming** – In honor of Black History Month, the BSHS will present a minimum of one educational program. This event will be free and open to the public. We hope to build on our past collaborations with Mount Bright Baptist Church in presenting this program.

- **March TBD: Women's History Month Programming** – In honor of Women's History Month, the BSHS will present a minimum of one educational program. This event will be free and open to the public.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q4 (April-June):**

- Visitor Services: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Staffing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Volunteers: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Marketing: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Budgeting: Continue as detailed in the Outline/Overview of Job Tasks and Schedules.
- Events/Exhibits:
  - **TBD: Annual Auction Gala** – Our largest fundraiser of the year features delicious food and drink, a live and silent auction, and marvelous theming. This event will be ticketed and limited to attendees 21 and older.
  - **TBD: May Volunteer Appreciation Event** – A free event to honor the many community volunteers and partners of the Burwell School.

### Outline/Overview of Job Tasks and Schedules

**Please explain generally how the organization plans to accomplish all goals associated with the scope of work, including but not limited to, marketing, hiring, volunteer recruitment, exhibit development, event tasks, etc.**

1. Visitor Services
  - a. Admission to the Burwell School Historic Site (BSHS) will continue to be free for walk-in visitors. Donations are always encouraged.
  - b. The site is staffed by our Visitor Services Coordinator (VSC) and/or Site Director (SD) during the week, with paid docent staffing during weekends.
  - c. Staff and volunteers will continue to refer all visitors to our site to our local partner agencies (i.e. The Alliance for Historic Hillsborough, Orange County Historical Museum, Hillsborough Arts Council, etc.) Relevant local visitor services materials (i.e. brochures, maps, event listings, etc.) will be displayed on-site as a resource for visitors and distributed through monthly email marketing.
  - d. Group tours, Girl Scout Merit Badge groups, and tours scheduled outside of normal business hours will incur a small fee based on the specifics of each group. These tours are directed by the VSC, with assistance from the SD and trained community volunteers. As of FY2023, the Burwell School no longer charges for school trips, to keep with our mission of education.
  - e. Normal Hours of Operation will continue to be Wednesday – Saturday from 11:00am to 4:00pm and Sunday from 1:00pm to 4:00pm. The BSHS will be closed during designated holidays, as well as a longer closure from mid-December through the New Year in observance of several holidays. At the recommendation of the HTB, the BSHS remained open for normal business hours during the winter months again during FY24, incurring

an estimated additional cost of \$5,000. We will continue to operate with normal business hours in the winter months in FY25, anticipating similar costs.

- f. All weekday tours will remain self-guided, unless by advance appointment with the VSC. Guided docent tours remain available upon request every Saturday and Sunday during normal operating hours.
- g. The BSHS will extend hours of operation in conjunction with the HAC's Last Friday events and the AHH's Rev War Day.

## 2. Staffing

- a. Site Director (FULL-TIME for FY25) – The Site Director handles daily site operations, including but not limited to marketing, scheduling of staff, administrative tasks for the Commission, report preparation, grant writing, and community partnerships. The SD also meets regularly with staff, commissioners, and partners. Prior to 2019, this position was full-time. With the generosity of the HTB, the Burwell School hired a full-time Site Director in FY24. It is in the best interest of the BSHS that this position remains at full-time.
- b. Financial Coordinator (PART-TIME for FY25) – The Finance Coordinator is responsible for the proper financial management of the BSHS, to include payroll, tax filings and payments, bill payments, reports, Sales & Use Tax payments, etc. The FC will continue to work closely with our CPA, chair, treasurer, finance committee, and Site Director to ensure all financial tasks are handled appropriately and transparently, maintain sound financial management practices, assure a system of checks and balances, and prepare for both monthly CPA reconciliations and official financial audits every 3 years. The FC will meet monthly with the treasurer and finance committee and prepare monthly Profit & Loss statements and balance statements. They will report directly to the HHC chair.
- c. Visitor Services and Historic Coordinator (PART-TIME for FY25) – The BSHS is fortunate enough to have found a staff member capable of taking on the responsibilities of the VSC and HC. In their capacity as VSC, this position oversees volunteers and docents, ensuring all Burwell events and special tours are covered. The VSC also supervises the gift shop. As Historic Coordinator, this position is responsible for presenting an accurate and respectful interpretation of the history of the site. The HC meets regularly with the Research Committee and oversees exhibits, programming, tour scripts, and docent training.
- d. Docents (PART-TIME for FY25) – Our staff of docents operates the site on the weekends, greeting visitors, offering guided tours upon request, facilitating sales at the gift shop, and referring guests to our partners around town. Upon request, they also assist with special events and tours.

## 3. Financial Management

- a. Thanks to the generosity of the HTB, the Financial Coordinator has assumed the daily financial transactions of the BSHS, with oversight from the chair, the treasurer, the finance committee, and our CPA. We will continue to work with a third-party firm to balance our books monthly to ensure all revenues match expenses.

## 4. Events/Exhibits

- a. The site will coordinate at least five (5) special events per year during or outside of normal business hours. This will include extended hours of operation during the

Hillsborough Arts Council's Last Friday events, as well as the town's Revolutionary War Day event.

- b. We will continue to offer a minimum of 1 exhibit complementing the events offered throughout the year.
- c. The Site Director, HHC chair, or other representative will present information to the Hillsborough Tourism Board at their quarterly meetings to include upcoming events, exhibits, and any planned improvements or changes to the BSHS.
- d. Each event will have a specialized marketing plan created for and targeted towards the specific event and its likely audience.

#### 5. Marketing

- a. Rack Cards: The HHC will continue to produce rack cards highlighting important aspects of the BSHS, including the logo of the Hillsborough Tourism Board. Additional brochures or flyers will be provided for special events as needed. Copies of these rack cards and/or flyers will be shared with the Town of Hillsborough, the Hillsborough Visitors Center, the Orange County Historical Museum, and other relevant local entities.
- b. Email Marketing: The HHC will continue to update and communicate with its extensive email distribution list as a cost-effective means of raising awareness of upcoming events and exhibits, as well as other BSHS happenings. Where practical and logical, the Hillsborough Tourism Board logo will be included on these communications, particularly those where sponsors are listed.
- c. Website: The HHC will continue to offer a robust website that is updated often, highlighting upcoming events, site history, and volunteer opportunities. The site also includes the "People of the Past" research database, which is currently under construction, receiving a much-needed update. This free database provides research regarding the Burwell family, students, free and enslaved people of color, and historic patrons of the School. We will continue to offer interactive virtual exhibits, such as our popular "Historical Comic Book" series free of charge, as well as our online gift shop and event registration.
- d. Social Media: The HHC will continue to utilize Facebook and Instagram to promote the site and its events. Our Site Director has linked the accounts via Meta Business Suite so that they function in tandem. In FY24, our SD and VSC created a TikTok account for the BSHS to share historical content with a variety of audiences. We hope to resume content creation on this account in FY25.
- e. Print/Electronic/Radio Marketing: The HHC will continue to submit press releases to local area news sources to distribute to readers. The HHC also hopes to collaborate with local radio stations.
- f. Marketing information will be presented quarterly by the Site Director, chair, or other representative to the HTB.

#### 6. Volunteers

- a. Recruitment: Under the supervision of the HHC Chair, the Site Director, and the Visitor Services Coordinator, the HHC recruits volunteers from the community to serve in a variety of capacities, including event assistance, special projects, etc. All volunteers receive a complete background check before working with the Commission.
- b. Fill-in Weekday Greeters: If staff is unavailable or needs additional assistance during group tours, trained volunteer greeters will be called upon to assist. Greeters are trained



by the Visitor Services Coordinator and will welcome guests, answer general questions, maintain visitor logs during their shifts, and refer visitors to our partner agencies.

- c. Additional Volunteers: Drawing from the community and former commissioners, the HHC utilizes volunteers on standing committees including, but not limited to, research, events, etc.

**Please explain how the organization is going to fundraise and build sustainability in FY25:**

**1. Fundraising**

- a. Burwell has seen success hosting a fall fundraising event in past years, so we plan to continue this in FY25. Our 2023 Fall Fest promised to be a great fundraiser, but a tropical storm put a slight damper on things. Despite the weather, we were able to host a successful event, and intend to hold a Fall Festival again in FY25 (with a rain date this time).
- b. The Burwell Annual Fund campaign will continue to serve as our major year-round fundraising campaign in FY25. We hope to build on our relationships with existing donors while reaching out to new potential donors through innovative marketing ideas. In FY25, we aim to explore new donor demographics, particularly connecting with young families through fun educational programming for children.
- c. In FY24, our Site Director created and launched the Burwell Sustainer Program, an easy-to-use program that allows donors to give monthly to the BSHS through a one-time sign-up. Sustainers receive a Sustainer bumper sticker as well as priority access to all ticketed Burwell events. We plan to continue marketing this program in FY25.
- d. The Burwell School Auction Gala will continue to serve as our primary fundraising event in FY25. We hope to build on existing relationships with community partners, donors, and sponsors and reach out to new potential donors in order to expand on past successes.

**2. Sustainability**

- a. With the hiring of a full-time Site Director and part-time Visitor Services Coordinator, the Burwell School has made strides towards financial self-sufficiency in FY24. We plan to continue building on the success of our paid group tours, Girl Scout programs, and gift shop in FY25.
- b. Our Site Director intends to continue pursuing capacity-building grants in FY25. We also intend to continue exploring corporate sponsorships for the Burwell School.
- c. Under the leadership of HHC Chair Matt Hughes, the Commission has established a Financial Strategic Planning Committee, whose purpose will be to craft a long-term financial plan to move the Burwell School closer towards financial self-sufficiency.

**Please explain how the organization plan to grow tourism in Hillsborough in FY25:**

**1. Programs**

- a. The Burwell School will continue offering programs that create experiences intended to draw in visitors from surrounding areas. One such example was our Black History Month

program in FY24. We brought in a scholar from California to present a program on Elizabeth Keckly. This type of event is unique and brought visitors from around the Triangle. We hope to build on this success and offer

## Marketing Plan

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q1(July-Sept):**

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.
- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the [Outline/Overview Scope of Work](#).

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q2 (Oct-Dec):**

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.
- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the [Outline/Overview Scope of Work](#).

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q3 (Jan-March):**

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.
- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the [Outline/Overview Scope of Work](#).

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q4 (April-June):**

- The Site Director produces a marketing plan for each quarterly event, generally those that are part of our designated annual or semi-annual programming focus. Each marketing plan includes

the production of flyers, social media posts, email marketing, press releases, and event listings on our website and other relevant online and print calendars.

- Where logical and appropriate, the logo for the HTB is included on these items.
- Smaller events are promoted via flyers, social media posts, and relevant event listings on our website.
- For specific event information for this quarter, please see the corresponding quarter section above in the Outline/Overview Scope of Work.

## Signatures

I hereby certify that the information contained in this proposal is true and accurate to the best of my knowledge and that I have reviewed the Town of Hillsborough's Non-profit Guidelines and our organization is in compliance.

### EXECUTIVE DIRECTOR

Signature:   
Emma Vadney (Mar 25, 2024 19:56 EDT)

Date: 03/25/2024

Printed Name: Emma Vadney

### BOARD CHAIRPERSON

Signature:   
Matt Hughes (Mar 26, 2024 11:54 EDT)

Date: 03/26/2024

Printed Name: Matt Hughes

### GRANT CONTACT PERSON (if different than Executive Director)

Signature:

Date:

Printed Name:

## Detailed Proposed Budget

a. Item	b. Amount Needed via Contract Funding in FY25 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	
i.e. Personnel Costs- .5 FTE- Part Time Coordinator (10 hours p/w)	Ex: \$6,500	Ex: \$1,000	Ex: \$500	Non-profit Grant	\$8,000
<b>1.Personnel Expense-7000</b> <b>a) 7001-Site Coordinator</b> (FULL-TIME in FY25) @ 30 hours p/w @ \$21= <b>\$32,760.00</b> <b>b) 7010-Finance Director @</b> 11 hours p/w @ \$21= <b>\$12,012.00</b> <b>c) 7002-Visitor &amp; Historical Services Coordinator @ 25</b> hours p/w @ \$18= <b>\$23,400.00</b> <b>d) 7004-Docent Wages @ 8</b> hours for 50 weeks @ \$16.60= <b>\$6,640.00</b> <b>e) 7006-Benefits</b> (Site Coordinator Only) 15% x wages medical stipend= <b>\$4,914.00</b> <b>f) 7007-Payroll Tax</b> -Company Paid= <b>\$9,600.00</b> <b>g) 7008-Payroll Service Fee</b> = <b>\$1,100.00</b>	\$70,000.00	\$20,453.00	\$0.00	N/A	\$90,453.00

<b>2.General Admin-8100</b>  8101-Advertising= <b>\$3,000.00</b> 8102-Computer/Software Maintenance= <b>\$1,000.00</b> 8111-Printing/Copying= <b>\$1,000.00</b> 8112-Office Equipment= <b>\$500.00</b> 8113-Office Supplies= <b>\$1,000.00</b> 8114-Newspaper= <b>\$24.00</b> 8116-Staff Expenses= <b>\$200.00</b> 8118-Charitable Solicitation License Renewal Fee= <b>\$53.00</b> 8120-Professional Fees= <b>\$3,900.00</b> (CPA-\$200 p/m + \$1500 990 prep/filing)	\$0.00	\$10,677.00	\$0.00	N/A	\$10,677.00
<b>3.Fundraising Costs-8200</b>  8201-Auction= <b>\$15,000.00</b> 8202-Fall Fest= <b>\$2,000.00</b> 8203-Other Events= <b>\$1,000.00</b>	\$0.00	\$18,000.00	\$0.00	N/A	\$18,000.00
<b>4.Programs-8300</b>  8301-Exhibits= <b>\$500.00</b> 8302-Research/Collections= <b>\$900.00</b> 8303-Catelogit= <b>\$450.00</b> 8305-Ancestry= <b>\$300.00</b> 8307-Newspapers.com= <b>\$150.00</b> 8308-Events(non-fundraising)= <b>\$500.00</b>	\$0.00	\$2,800.00	\$0.00	N/A	\$2,800.00

<b>5.Gift Shop-8400</b>					
8401-Cost of Goods Sold= <b>\$500.00</b>	\$0.00	\$575.00	\$0.00	N/A	\$575.00
8402-Sales Tax Due (pass thru only)= <b>\$75.00</b>					
<b>6.Facility (Utilities &amp; Maintenance)-8500</b>					
8501-Electricity/Gas= <b>\$6,500.00</b>					
8502-Water/Sewer= <b>\$1,000.00</b>					
8503-Telephone/Internet= <b>\$2,300.00</b>					
8504-Groundskeeping= <b>\$9,600.00</b>	\$0.00	\$21,850.00	\$12,000.00	Orange County Outside Agency Grant applied for	\$33,850.00
8505-Pest Control= <b>\$500.00</b>					
8506-Site Maintenance= <b>\$3,000.00</b>					
8508-Safety/Security (Alarm System)= <b>\$500.00</b>					
8509-Property Tax= <b>\$450.00</b>					
8510-Insurance= <b>\$10,000.00</b>					
<b>7.Other Expenses-8600</b>					
8603-Bank charges/PO Box= <b>\$50.00</b>					
8605-Merchant Processing Fees= <b>\$1,000.00</b>	\$0.0	\$2,520.00	\$0.0	N/A	\$2,520.00
8606-Storage Unit Rental= <b>\$1,320.00</b>					
8607-Misc.= <b>\$150.00</b>					
<b>TOTALS</b> (sum of each column)	<b>\$70,000.00</b>	<b>\$76,875.00</b>	<b>\$12,000.00</b>		<b>\$158,875.00</b>
** PLEASE ADD ROWS AND/OR PROVIDE ADDITIONAL SHEETS IF THERE IS NOT ENOUGH ROOM TO ACCOMMODATE YOUR FULL BUDGET **					





**STAFF REPORT**  
Hillsborough Tourism Board  
April 10, 2024

**PRESENTER/INFORMATION CONTACT**

Tourism Program Manager, Shannan Campbell

**ITEM TO BE CONSIDERED**

**Subject:** Chamber of Commerce Contract for FY25 (Hillsborough Holiday Parade and Tree Lighting)

**Attachments:**

1. Chamber's Contract Response and Budget

**Background:**

This is the first year that the Chamber has contracted with the Tourism Board. Previously grants have been given to the Chamber to hold these events.

**Summary, key points, and questions:**

- The Chamber is asking for \$10,00 in FY25
- There are no budget justification forms as this is the first year contracting.

**Staff recommendation and comments:**

None.



## FY 2025 Contract Scope of Work Response

### Hillsborough Chamber of Commerce - Events

#### Organization Information

Organization Name: Hillsborough/Orange County Chamber of Commerce

Contact Person and Title: Scott Czechlewski, CEO

Contact Person Email:

[scott@hillsboroughchamber.com](mailto:scott@hillsboroughchamber.com)

Contact Person Phone: 919-732-8156

Organization Street Address: 200 N. Churton St.

City: Hillsborough

State: NC

ZIP Code: 27278

Organization's Annual Operating Budget: \$ 215,000

#### General Contract Information

Contract Name: Hillsborough Holiday Parade and Tree Lighting

Month(s) or Date(s) in which Proposal Project/Services will take place: **JULY 1<sup>st</sup>, 2024- JUNE 30th, 2025**

#### Outline/Overview of Scope of Work

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q1(July-Sept):

- Obtain local event permits
- Schedule port-a-potty and handwashing station rentals
- Secure commitment for a grand marshal, DJ, choral groups, etc.
- Update marketing and other materials
- Begin Leadership Team meetings to discuss lessons learned from 2023 parade, needed changes, etc.
- Begin assessing required police support, road closures, street signage (digital boards), etc. to support event operations
- Work with Elf Run organizers to determine route changes (if any), general logistics, etc.
- Secure food vendor
- Update website and registration forms
- Begin advertising for and collecting registrations for parade entries (update registration portal)
- Develop program for tree lighting
- Meet with destination marketing partners to discuss advertising for events and create plan
- Reserve floats from rental company
- Review applications for Santa and Mrs. Claus and schedule appearance
- Arrange liability insurance policy
- Reserve courthouse grounds for tree lighting ceremony

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q2 (Oct-Dec):

- Review and finalize everything mentioned in Q1 description
- Begin volunteer recruitment – Volunteer Match website, schools, 4-H, etc.
- Monthly/Bi-weekly meetings with leadership team
- Create volunteer assignments and explain responsibilities (write info sheets)
- Create parade lineup for 75-85 entries
- Update and distribute safety guidelines and collect signed sheets, driver's license and insurance info for mechanized entries
- Coordinate with other nearby venues, historic sites, and cultural centers to include other parade event elements
- Design parade lineup maps and info sheets for participants
- Create digital event map
- Schedule Mayor and Commissioners to participate in tree lighting
- Schedule Orange County and NC state elected officials to participate in parade
- Secure classic cars and/or firetrucks for VIPs to ride in
- Email all parade participants their individual parade entry number, map, etc.
- Finalize street closure, security, clean-up, etc. plans
- Review and finalize Elf Run registrations
- Secure permissions from shopping centers to use parking lots for float staging
- Arrange additional lighting along Churton St.
- Distribute letters to those living on parade route to inform of street closures
- Brief volunteers on their day-of-parade duties
- Spray line-up numbers/slots on streets the morning of parade
- Hold a parade!

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q3 (Jan-March):

N/A – parade/tree lighting planning generally takes place in Q1 and Q2

Please explain generally how the organization is going to perform the duties requested in the FY2024 Contract Scope of Work Update during Q4 (April-June):

N/A -- parade/tree lighting planning generally takes place in Q1 and Q2

## Outline/Overview of Job Tasks and Schedules

Please explain generally how the organization plans to accomplish all goals associated with the scope of work, including but not limited to, marketing, hiring, volunteer recruitment, exhibit development, event tasks, etc.

Chamber staff will handle the vast majority of the holiday parade and tree lighting event organization tasks outlined above. We will collaborate with Alliance staff on marketing.

We will work closely with a Leadership Team composed of Town staff, police/fire, Elf Run, etc.

Volunteer recruitment will be done through Volunteer Match, outreach to high schools and 4-H, and direct recruitment of past volunteers (Chamber board members, community partners, etc.).

Please explain how the organization is going to fundraise and build sustainability in FY25:

We will try to recruit new sponsors for the parade. However, many businesses view their participation in the parade satisfies their visibility goals and aren't interested in additional investment as a sponsor.

Please explain how the organization plans to grow tourism in Hillsborough in FY25:

Re-launch of Merchants Association could create additional events (like Ladies Night Out), more marketing and promotion, increased collaboration between business owners, streetscape and signage improvements, etc., which should aid tourism. The Chamber is participating in efforts to move the Efland Seafood Festival to Hillsborough in 2025. We will continue to create our digital relocation/community profile, market the area through our website, and advertise in Chapel Hill and Durham magazines.

## Marketing Plan

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q1 (July-Sept):

Direct marketing (email blasts) to Chamber member businesses, publication of community newsletter, advertising in Chapel Hill/Durham magazines, working with Visitors Bureau and tourism sites on marketing plan (collaborative effort), event banners and signage along roadways to advertise parade, coverage of both events in News of Orange, possible radio spots on Chapelboro and WHUP, etc.

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q2 (Oct-Dec):

[same as above]

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q3 (Jan-March):

N/A

Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q4 (April-June):

N/A

## Detailed Proposed Budget

a. Item	b. Amount Needed via Contract Funding in FY23 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	
i.e. Personnel Costs- .5 FTE- Part Time Coordinator (10 hours p/w)	Ex: \$6,500	Ex: \$1,000	Ex: \$500	Non-profit Grant	\$8,000
1. Equipment Rentals - Portable Toilets	\$950		\$		\$950
2. Santa Float Rental	\$575		\$		\$575
3. Liability Insurance	\$550		\$		\$550
4. Printing - Banner	\$385		\$		\$385
5. Printing – Signs for VIP cars	\$255		\$		\$255
6. Equipment Rentals – Street Lighting		\$	\$10,000	Carolina Sunrock	\$10,000
7. Staffing	\$6,935	\$	\$		\$6,935
8. DJ	\$350	\$	\$		\$350
9.	\$	\$	\$		\$
10.	\$	\$	\$		\$
11.	\$	\$	\$		\$
12.	\$	\$	\$		\$
13.	\$	\$	\$		\$
14.	\$	\$	\$		\$
15.	\$	\$	\$		\$
<b>TOTALS</b> (sum of each column)	\$10,000	\$	\$10,000		\$20,000

\*\* PLEASE ADD ROWS AND/OR PROVIDE ADDITIONAL SHEETS IF THERE IS NOT ENOUGH ROOM TO ACCOMMODATE YOUR FULL BUDGET \*\*

## Signatures

I hereby certify that the information contained in this proposal is true and accurate to the best of my knowledge and that I have reviewed the Town of Hillsborough's Non-profit Guidelines and our organization is in compliance.

### EXECUTIVE DIRECTOR

Signature:



Date: 3/13/2024

Printed Name: Scott Czechlewski

### BOARD CHAIRPERSON

Signature:



Date: 3/13/2024

Printed Name: Emilee Collins

### GRANT CONTACT PERSON (if different than Executive Director)

Signature:

Date:

Printed Name:



**STAFF REPORT**  
Hillsborough Tourism Board  
April 10, 2024

**PRESENTER/INFORMATION CONTACT**

Tourism Program Manager, Shannan Campbell

**ITEM TO BE CONSIDERED**

**Subject:** Hillsborough Arts Council Contract Renewal for FY25 (Visitors Services & Events)

**Attachments:**

1. HAC Contract Response and Budget
2. HAC Budget Justification Forms

**Background:**

The Tourism Program started contracting with the Hillsborough Arts Council in FY17 to support the continuation of Last Fridays Art Walks. In FY19, HAC asked for additional support in putting on the Bi-annual Handmade Parade events. In FY24 HAC asked for some additional support with volunteer coordination/staffing at their gallery and gift shop. The annual Solstice Walk has been supported by tourism grants and is no longer eligible for that funding source. The HAC is asking for additional funds to continue to offer the Solstice Lantern Walk in FY25.

**Summary, key points, and questions:**

- The Hillsborough Arts Council is asking for \$43,000 in FY25, a \$14,500 increase over the FY24 contract amount of \$28,500.
- Budget Justification Forms are included explaining expanded needs in the following budget lines:
  - Last Fridays and Art Walk (More performers, portalets, advertising/marketing, photography, personnel) \$5,000
  - Solstice Lantern Walk (various event costs, broken out in BJJ) \$10,000

**Staff recommendation and comments:**

None. There's a discrepancy between the total amount of budget justifications (\$15,000) and increase being requested (\$14,500).





## FY 2025 Contract Scope of Work Response

### Hillsborough Arts Council - Visitor Services & Events

<b>Organization Information</b>		
Organization Name: Hillsborough Arts Council		
Contact Person and Title: Heather Tatreau, Executive Director		
Contact Person Email: director@hillsboroughartsouncil.org	Contact Person Phone: 919-643-2500	
Organization Street Address: 102 N Churton Street		
City: Hillsborough	State: NC	ZIP Code: 27278
Organization's Annual Operating Budget: \$ 395,000		
Total Request for FY25 Contract: \$43,000		
<b>General Contract Information</b>		
Contract Name: Hillsborough Arts Council's Last Fridays & the Art Walk, Solstice Lantern Walk, The Handmade Parade & Market, and Gallery & Gift Shop		
Month(s) or Date(s) in which Proposal Project/Services will take place: JULY 1, 2024- JUNE 30, 2025 <ul style="list-style-type: none"> <li>Full Programming for Last Fridays &amp; the Art Walk: March - November each calendar year</li> <li>The Art Walk: January - November each calendar year</li> <li>The Solstice Lantern Walk - scheduled on the Winter Solstice in December each year.</li> <li>The Handmade Parade: occurs in even years and has been moved to the spring to coincide with HAC's annual art fair, now called the Handmade Market; next occurrence with FY25 &amp; FY26 combined TB funding expected May 2026</li> <li>Gallery and Gift Shop: operating 6 days per week year-round</li> </ul>		
<b>Outline/Overview of Scope of Work</b>		
<p><b>Last Fridays &amp; the Art Walk (LFAW): General Program Background &amp; Update for Scope of Work</b></p> <p>HAC has worked over the past four fiscal years to create cohesion between Last Fridays programming and Art Walk activities, improving the brand recognition, town &amp; tourism exposure, marketing awareness, public engagement, and overall event experience for LFAW partners and visitors.</p> <p>Since 2021, HAC has adjusted the LFAW timeline to provide "full programming" (art walk + music, poetry, roaming entertainment, arts activities, etc.) March-November, allowing for a strategic build up in the spring, driving traffic as it becomes warmer and more enticing to circulate town, maintaining buzz and boosting business in the heat of the summer, and crescendoing activities as winter is welcomed to celebrate with a "season finale". The Art Walk extends to operate in January &amp; February as well, but without any specialized entertainment elements coordinated by HAC.</p> <p>Heading into FY25, we plan to continue with our successful "decentralized model" for the event, which activates multiple programming zones around town and has had a demonstrable, positive impact on local businesses, artists, community groups, and venues. Our focus has also expanded to include more community groups and to reach audiences that were historically underrepresented in LFAW programming, embodying our firm belief that the arts are for all and fulfilling our mission to build our</p>		

community through the arts. Beginning in FY22, HAC committed to closely tracking the impact of LFAW programming on our Gallery & Gift Shop in downtown Hillsborough, as well as soliciting feedback and data from partnering venues and businesses who remain open each LFAW. The following information speaks to the importance of HAC's role to drive tourism, and the success of our revisions to the LFAW program model:

- On average, retail sales at the G&GS during LFAW experience a 300% increase compared to average daily sales not occurring during LFAW.
- On average, visitation to the G&GS during LFAW experiences a 500% increase compared to average daily visitation not occurring during LFAW.
- Local restaurants & bars reported up to 35% average increase in sales during LFAW compared to normal Fridays. Most restaurants have had to expand outdoor dining and reservation times to accommodate the spike in demand they experience during LFAW.
- Local galleries and art walk venues reported up to 80% average increase in visitation during LFAW compared to normal Fridays. Some venues had even higher increase rates (over 100%) due to their limited normal operating hours and the impact of LFAW on their visibility.

### **Solstice Lantern Walk (SLW): General Program Background & Update for Scope of Work**

The Solstice Lantern Walk (SLW) has become a beloved annual event in Hillsborough, giving residents a reason to come together and celebrate the peaceful quiet that the darker, colder months can bring. Encouraging creativity and a celebration of the community that binds us together and gives us strength in difficult times, the Solstice Lantern Walk brings light to Hillsborough on the darkest day of the year. Celebrations of light in darkness are an important feature of winter holidays celebrated by many cultures throughout history, and help to create a sense of shared culture in our diverse community while providing an opportunity for participants to create lanterns that reflect their own cultural and creative identities.

HAC has a 5 year vision for expanding the event into a festival model inspired by various international winter markets, with food, beverages, family friendly activities, and craft vendors, all culminating in The Solstice Lantern Walk. In 2021 we took the first steps in that direction with an after-walk celebration, and with funding support from the Tourism Board Special Projects Grant in 2022, we hosted the first-ever Solstice Market in conjunction with the walk. This program expansion has allowed for a dramatic increase in impact, both on local artists and our economy. In FY23, we hosted 12 artist vendors, 3 different musicians offering live entertainment, and 4 food/beverage vendors, plus multiple collaborating community groups. These additional components drew a larger crowd to the Solstice Lantern Walk than years past and kept audiences in town for longer, enticing them to support small businesses and giving them the opportunity to develop a deeper appreciation for Hillsborough. In FY24, the Solstice Market featured 12 artist vendors, a popular band, 4 food & beverage vendors, 2 food trucks, and a gathering space for the community to celebrate the magic of the winter season. We also provided activities in River Park for participants to enjoy before and after the walk: a singing bowl artist, telescopes set up by the Chapel Hill Astronomical and Observation Society, and the Spiral of Light. HAC took on the responsibility of creating the Spiral of Light in consultation with Stephanie Trueblood. Additionally, we had 9 participating businesses/venues who joined in to celebrate the solstice with special pre-walk and post-walk promotions, encouraging visitors to maximize their evening in Hillsborough.

In FY23, it is estimated that SLW had at least 3,000 people in attendance. In FY24, it is estimated that SLW had at least 4,500 visitors in attendance for the walk and to watch, marking a 1500 visitor increase for the event. Of those in attendance in FY24, over half were tourists.

In order to continue this exciting evolution, consistent and ongoing support from Hillsborough's Tourism Board, and other community funders, is essential, and will ensure the successful expansion of this event into a festival that is already becoming a treasured and much anticipated part of Hillsborough's cultural life. For the 2024 SLW, we are planning to expand opportunities for designated viewing areas and more "off-ramps" during the walk to make it more accessible for people with limited mobility to enjoy the festivities with a shorter walk. We are also looking into the feasibility of including West Hillsborough in our programming while helping to alleviate parking downtown.

### **Handmade Parade (HMP): General Program Background & Update for Scope of Work**

On April 30, 2022, the Handmade Parade returned after a four-year hiatus due to the impacts of the COVID-19 Pandemic. HAC made the decision to move this bi-annual event to the spring, in order to strategically spread HAC's tourism activities across the calendar year and to combine efforts with HAC's highly-attended spring art fair. With FY22 support from the Tourism Board, this new model was officially introduced as the "Weekend of Art in Hillsborough" (WOA), featuring April's Last Fridays & the Art Walk, the Handmade Parade, and the Handmade Market (HMM, formerly known as "Art in the Heart").

This approach was well received by the community and resulted in improved tourism impact and overall visitation to Hillsborough compared to previous occurrences of the HMP. Due to the variety of activities offered through the "Weekend of Art", at least 5,000 participants were recorded and marketing efforts attracted a broader audience. This combined initiative also allowed for a more efficient use of HAC's staff, administrative, & operational costs, which increased as a necessity to sustain the future of HAC's tourism efforts and community programming.

The next occurrence of the HMP/HMM will be May 31-June 1 2024, supported with reserved tourism board funding from FY23 and the current FY24 grant. The parade will incorporate 10+ community partnerships & performing artists, large-scale handmade puppets; costumes, music, & dance; and will entice public participation. The market will feature 50+ artists, food & beverage vendors, family-friendly activities, and other arts experiences to serve as pre-parade and post-parade festivities. We will also host several advanced puppet-making workshops, plus accessible opportunities for businesses, families, and visitors to create their unique addition to the parade. Additionally, the Adopt-a-Puppet program will include several community groups and schools tasked with refurbishing old puppets and walking with them in the parade.

### **Gallery and Gift Shop (G&GS): General Background & Update for Scope of Work**

HAC's Gallery & Gift Shop (G&GS) located in the heart of downtown Hillsborough is an essential tourism resource, serving as a point-of-entry for HAC programs and for Hillsborough's arts & culture scene at large. First opening at its current location in 2013 as a standard gallery venue, the Gallery & Gift Shop

now operates 6 days a week year-round, represents artwork by over 60 local artists, and has become an information hub for residents and visitors to learn about Hillsborough's creative community, especially during major town-wide events. In 2023, the Gallery & Gift Shop served 13,591 visitors and generated over \$64,417 in direct income for local artists, which further stimulated Hillsborough's economy.

In 2021, HAC hired its first paid Gallery & Gift Shop Manager. This experimental, part-time position was essential for stabilizing G&GS operations during the pandemic and ensured a strategic focus on growing revenue for artists and expanding the economic impact of HAC's community services. HAC's investment in paid staff has proven to be a worthwhile endeavor - within the first year of having a dedicated Gallery & Gift Shop Manager, hours of operation expanded by 60% (including staying open late on Friday & Saturday nights, when tourists are often looking for unique shopping & arts experiences alongside dining) and gross revenue increased by 46% compared to pre-pandemic sales. In 2023 and 2024, these statistics continue to climb, including the number of visitors and artists benefiting from our services at the Gallery & Gift Shop.

With investment in stabilized & expanded operations comes increased costs. HAC serves as a vital resource for the town of Hillsborough, representing our breadth of local arts & culture and pointing visitors to other galleries, historic sites, local businesses, and entertainment venues. The G&GS has become a go-to location to learn about events and recreation in Hillsborough, particularly related to arts and cultural activities for tourists to experience and enjoy. Due to continued demand, HAC made the strategic decision to promote the Gallery & Gift Shop Manager role to a full-time position in fall 2022 and this decision has proved beneficial for HAC and our local artists. The local artist community is more fully supported, gallery updates are more regular, and oversight of gallery installations has been professionalized. However, along with operational grants and sales revenue, we need sustaining support from the Tourism Board to maintain the rising costs of this essential tourism-driving operation.

The Gallery & Gift Shop is also a growing destination for pop-up workshops, art demonstrations, artist talks, and visitor services. In FY25, we plan to expand our educational offerings by creating regular opportunities for the public to interact with our artists and learn more about their craft. We will publicize these engagements widely in order to attract tourists to Hillsborough. Our G&GS manager is also working on a long term project called, "Meet the Artist." She is collecting 3-minute videos from each of our artists with short demonstrations of their art making process. Once collected, an iPad will be available in the shop for patrons to interact with and learn more about these artists. Hearing directly from the artists about their work will have a positive impact on patrons' appreciation of the art in our shop. We suspect this will also have a positive impact on sales.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q1(July-Sept):**

**LFAW Q1:**

Each LFAW season straddles two fiscal years, so Q1 of this program begins half way through the 2024 calendar year/LFAW season.

Q1 LFAW programming will include unique, rotating entertainment, including components like:

- Special exhibitions, receptions, and gallery openings at 21+ participating venues on the Art Walk
- Makers Markets with live music and 20+ artists & community vendors on the Old Courthouse lawn
- A variety of live music performances at local venues and around town
- Showcases of poetry, prose, and spoken word in partnership with Jennifer Daniels
- Dancewaves, drumming & more in River Park, in partnership with the Living Arts Collective
- Family-friendly activities & crafts
- Opportunities to connect and interact with nature, local history, and the arts
- Performance & circus artists
- Community collaborations and nonprofit showcases
- HAC & LFAW info tent/tourism services booth on the Old Courthouse lawn

Administrative efforts will include:

- Planning, designing, and implementing strategic marketing of the events & participating local businesses/partners
- Maintaining communications with artists, stakeholders, collaborators, & partnering venues
- Collecting data, conducting assessments, and making minor adjustments of programming to ensure ROI and maximum impact

#### **SLW Q1:**

HAC will be identifying artists, vendors and connecting with local businesses to partner on this cherished Hillsborough event.

#### **HMP Q1:**

In Spring 2024, HMP will return along with the newly introduced HMM for the Weekend of Art (WOA). After the completion of HMP/HMM/WOA 2024, HAC will have new information to build from in planning the next WOA for 2026. As Q1-Q4 of FY25 comprise an “off year” for the parade, most of the activities will include debriefing the 2024 HMP/WOA and planning high-level strategies for the 2026 HMP/WOA.

Meetings will be scheduled with organizations, community, and regional leaders to propose collaborations and innovative ways that will increase participation for the next parade. By working closer with these potential partners and businesses, this program will grow in local and regional recognition as a signature event for HAC & a major weekend destination for art and culture in Hillsborough. Q1/Q2 tasks for this off year are:

- Evaluate last event and complete comprehensive planning to take the event into the future.
- Repair, document, and ensure proper storage for existing and new puppets.
- Integrate themes, activities, and successes of HMP into other HAC programs, to ensure public maintains awareness of and excitement for next parade.
- Engage 2024 HMP participants in other HAC events and activities that occur in FY25, further developing community relationships and fostering deeper connection to the arts in Hillsborough.

**G&GS Q1:**

In 2023, the G&GS started a new quarterly process for artists who wish to apply to consign. Each quarter, the G&GS accepts applications from local artists for the opportunity to showcase their work in-store. The G&GS consignment partnership provides income & stability to local artists and entices visitors to stop in to learn about HAC's programmatic activities throughout the year.

Q1 is the heat of the summer, which means visitation and sales to Hillsborough businesses can suffer a dip, even with the G&GS expanding capacity to stay open 6 days a week. During Q1, HAC and the G&GS will execute duties outlined in this grant by:

- Making strategic efforts to entice tourism including demonstrations, sales and promotions, and artist events.
- In August, we'll tie in themes of back to school and highlight student/youth arts and arts education. There will be a major drive for our ArtCycle program, which collects and distributes art supplies to local schools.
- Host receptions and artist talks during each Last Fridays & the Art Walk.
- Partner with other local tourism-driving groups, including OCAC, OCHM, Burwell, and the Alliance/Visit Hillsborough to collaborate on summer events whenever possible
- Track demographic data at the G&GS from those willing to share, in effort to better understand our key audiences and to determine which audiences may require more proactive engagement.

Seasonal window displays are refreshed at the shop. Also, exhibition rotations at "HAC Satellite Galleries" occur - a new, experimental initiative that was launched in 2023 to expand our impact for artists & overall enhancing more physical spaces in Hillsborough by providing artwork in non-traditional spaces at select venues around town.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q2 (Oct-Dec):**

**LFAW Q2:**

October LFAW is always one of the highest attended months due to its alignment with Halloween and we particularly see a surge in families visiting Hillsborough. We plan to bring back the popular Dia De Los Muertos theme again this year to support cross-cultural activities. Programming will include unique, rotating entertainment, including components like:

- Special exhibitions, receptions, and gallery openings at 21+ participating venues on the Art Walk
- Makers Markets with live music and 20+ artists & community vendors on the Old Courthouse lawn
- A variety of live music performances at local venues and around town, including Aztec dancers.
- Showcases of poetry, prose, and spoken word in partnership with Jennifer Daniels
- Dancewaves, drumming & more in River Park, in partnership with the Living Arts Collective
- Family-friendly activities & crafts
- Opportunities to connect and interact with nature, local history, and the arts
- Performance & circus artists
- Community collaborations and nonprofit showcases
- HAC & LFAW info tent/tourism services booth on the Old Courthouse lawn

- **PLUS:** special halloween-themed activities, historic ghost tours, a living ofrenda, and merchant trick-or-treat collaborations.

November LFAW programming will be a scaled back version of peak LFAW offerings, adjusting to the coming winter season and earlier evening hours. Strategies to promote “small business/shop local”, artist Sunday, holiday season activities, and other winter traditions, including the Solstice Lantern Walk, will be integrated.

December marks the beginning of the “off season” for Last Fridays, allowing staff to focus heavily on a debrief of the 2024 calendar year/LFAW season, survey participants and stakeholders, and adjust strategies for the 2025 calendar year/LFAW season. Other tourism-driving activities hosted by HAC continue during this time, including the Solstice Lantern Walk, Gallery & Gift Shop, etc.

Administrative efforts will include:

- Planning, designing, and implementing strategic marketing of the events & participating local businesses/partners
- Maintaining communications with artists, stakeholders, collaborators, & partnering venues
- Collecting data, conducting assessments, and making minor adjustments of programming to ensure ROI and maximum impact
- Surveying participating venues & contracted artists for feedback, debriefing all elements of the 2024 season with internal and external stakeholders
- Beginning to outline strategy for the 2025 season
- Directing tourism and visitation to other special fall, holiday, and winter traditions that occur around Hillsborough and supporting the marketing efforts of these groups/activities

## **SLW Q2:**

Q2 marks the active planning phase and execution of SLW. Staff will finalize vendor/artist contracts, permits, and volunteer assignments. Logistical preparations include taking inventory of supplies, purchasing new supplies, assembling luminaries, creating signs, setting up/monitoring website registration, and holding orientation sessions for volunteers. Creating the Spiral of Light in River Park is another task that requires a team of volunteers to collect and lay out the greenery ahead of the event, followed by deconstruction of the spiral after the event. This year, we will create designated viewing areas for participants who prefer to watch. This endeavor will require clear messaging and increased marking efforts.

The SLW event takes place in late December and requires full staff, board, and volunteer involvement. A clear timeline of duties will be put into place by our Program Director so there is a smooth execution. Providing a safe and enjoyable experience for over 4,000 participants is our top priority in December.

## **HMP Q2:**

Since FY25 is an off year for HMP, there is no active planning in Q2. However, possible collaborations and artist invitations are considered year round. We must also ensure that parade materials, such as large-scale puppets, are properly stored to minimize damage.

**G&GS Q2:**

Q2 occurs over the holiday season. Fifty percent of our total annual sales occur in this quarter, so it's the busiest time of year for our team. The G&GS experiences significant uptick in visitation from out of town and thus an increased need for HAC/G&GS volunteers to provide suggestions of places to shop, dine, and explore while they are in town for the holidays. The success of the Solstice Lantern Walk also depends on the G&GS to be highly operational - we sell over 500 lantern kits, host lantern workshops, and help people get signed up/learn about the event. For Q2, the G&GS contributes to TB objectives by:

- Providing visitation information for increased tourist traffic.
- Selling lantern kits & leading workshops for those participating in the Solstice Lantern Walk, which occurs in December on the winter solstice.
- Accepting new quarterly artist consignment applications.
- Collaborating and cross-promoting other holiday happenings around town, including the Holiday Parade, Gingerbread Exhibition, and more.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q3 (Jan-March):****LFAW Q3:**

Jan & Feb LFAW programming will scale back to focus primarily on the Art Walk. HAC will support participating venues through website marketing and providing cross-promotion of efforts such as:

- Special exhibitions, receptions, and gallery openings at 10+ participating venues on the winter Art Walks
- Live music performances at local venues
- Family-friendly activities & crafts
- Opportunities to connect and interact with local history and the arts

Q3 allows staff to focus heavily on reviewing feedback from the 2024 calendar year/LFAW season, outlining strategies for the 2025 calendar year/LFAW season, and initiating plans to ensure public awareness of the return of full programming. Communications with venues to confirm their participation in 2025 pick up by early February.

In March, full programming for Last Fridays & the Art Walk returns with a season kick-off, strategically building back momentum for the year and incorporating spring themes.

Administrative efforts will include:

- Maintaining communications with artists, stakeholders, collaborators, & partnering venues
- Collecting data, conducting assessments, and making minor adjustments of programming to ensure ROI and maximum impact
- Surveying participating venues & contracted artists for feedback, debriefing all elements of the 2024 season with internal and external stakeholders
- Finalizing strategy for the 2025 season and sharing outline with stakeholders.
- Directing tourism and visitation to the Jan/Feb Art Walk and other activities that occur around Hillsborough; supporting the marketing efforts of these activities.
- Confirming themes, community collaborations, and artistic partnerships for 2025 LFAW season.
- Securing permits and developing updated marketing materials and planning resources.



- Planning, designing, and implementing strategic marketing of the upcoming 2025 LFAW season & participating local businesses/partners.

### **SLW Q3:**

In January, staff and volunteers meet to debrief on December's SLW. Successes and ideas for improvements are documented to inform planning for next year. Statistics are compiled on demographics of participants and the budget is reconciled. During the remainder of the quarter, any suggested changes are kept in mind when meeting with stakeholders about HAC events. Possible SLW collaborations are considered year round.

### **HMP Q3:**

Since FY25 is an off year for HMP, there is no active planning in Q3. However, possible collaborations and artist invitations are considered year round. We must also continue to ensure parade materials, such as large-scale puppets, are properly stored to minimize damage.

### **G&GS Q3:**

During Q3, the G&GS closes to the public for the first 3 weeks of January. During this time, the gallery is rotated to showcase new work and the shop is restocked & reorganized for a fresh look. Any renovation projects or necessary upgrades/improvements to our physical space and operations are also addressed during this time. Quarterly applications for consignment are accepted for prospective artists to showcase their works in the G&GS. Valentine's Day, black history month, women's history month, and other seasonal holidays or important celebrations are promoted. Seasonal window displays are refreshed. Collaborations with students from Cedar Ridge High School's IB program are finalized & multiple student art exhibitions are held, which have proven to be extremely popular with visitors and community members alike. Gallery artists are confirmed for the upcoming calendar year.

### **Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q4 (April-June):**

### **LFAW Q4:**

Q4 LFAW programming will include unique, rotating entertainment, including components like:

- Special exhibitions, receptions, and gallery openings at 21+ participating venues on the Art Walk
- Makers Markets with live music and 20+ artists & community vendors on the Old Courthouse lawn
- A variety of live music performances at local venues and around town
- Showcases of poetry, prose, and spoken word
- Dancewaves, drumming & more in River Park, in partnership with the Living Arts Collective
- Family-friendly activities & crafts
- Opportunities to connect and interact with nature, local history, and the arts
- Performance & circus artists
- Community collaborations and nonprofit showcases
- HAC & LFAW info tent/tourism services booth on the Old Courthouse lawn

Administrative efforts will include:

- Planning, designing, and implementing strategic marketing of the events & participating local businesses/partners
- Maintaining communications with artists, stakeholders, collaborators, & partnering venues
- Collecting data, conducting assessments, and making minor adjustments of programming to ensure ROI and maximum impact
- Finalizing process for Makers Market applications and preparing vendors for the re-launch of that component

**SLW Q4:**

Any suggested changes from the last event are kept in mind when meeting with stakeholders. Possible SLW collaborations are considered year round.

**HMP Q4:**

Q4 of FY25 will mark the point where the next Handmade Parade is one year out. Confirmation of 2026 HMP/WOA budget and any additional fundraising planning needs will occur. Also, preliminary planning will begin, as well as public marketing initiatives to ensure awareness of the 2026 return of the HMP.

Activities will include:

- Establish 2026 parade concepts and confirm the date.
- Plan outline of activities and other parade-adjacent events, including plans for the WOA.
- Confirm dates with community collaborators and calendars.
- Contact community groups, schools, and businesses to help them plan for the next HMP and invite them to participate in other events in Hillsborough in the meantime.
- Continue “adopt a puppet” program to engage other groups in repairing or re-working puppets to fit new themes.

**G&GS Q4:**

Standard operations continue and we see a spike in the late spring with more visitors in town as the weather improves. Monthly Last Fridays & the Art Walk receptions, artist talks, demonstrations, and pop-up workshops are held. Special promotions for mother’s day and other popular shopping holidays. Quarterly acceptance of new artists and cross-promotion of other major cultural events. Seasonal window displays are refreshed.

**Outline/Overview of Job Tasks and Schedules**

**Please explain generally how the organization plans to accomplish all goals associated with the scope of work, including but not limited to, marketing, hiring, volunteer recruitment, exhibit development, event tasks, etc.**

HAC is committed to building & enriching the Hillsborough community through the arts. The primary way we fulfill this mission is by offering 8+ public programs and signature events year-round. Doing so requires coordination and collaboration between staff, board, and volunteers 365 days per year. The COVID-19 pandemic exposed vulnerabilities in HAC’s over-reliance on volunteers for lead program management & mission fulfillment, and created an opportunity for the board to reassess personnel needs to ensure steady and sustainable growth for HAC. In FY21, the board hired part-time contractors

to begin fulfilling the marketing, programming, retail management, and fundraising needs of the organization. In FY22, the board voted to transition these employees to two separate full-time roles, further stabilizing, professionalizing, and investing in the consistent delivery of HAC's mission.

Going into FY23, HAC established 4 staff positions that execute daily operations: The Executive Director (FT), Program & Marketing Director (FT), Gallery & Volunteer Manager (FT), and Bookkeeper (PT).

Recognizing the need for experienced arts & nonprofit professionals to manage daily operations, the HAC board is gradually transitioning from a working board to a governing board that is focused on short and long term strategic planning and overall mission compliance. The full-time Executive Director is responsible for fundraising, grant writing, oversight of staff & programs, strategic planning, and community relationships. The full-time Program & Marketing Director oversees all day-to-day marketing efforts, develops and executes strategies to boost visibility of arts and culture in Hillsborough, and supports all public-facing/communications efforts of HAC. This staff member also currently takes the lead on nearly all day-to-day programming efforts, including permitting, contracting, and event planning, with support from other staff and volunteers. The Gallery & Volunteer Manager oversees the Gallery & Gift Shop, ensuring this vibrant shopping destination is open 6 days a week year-round, and is responsible for the behind-the-scenes and administrative aspects of the G&GS. A dedicated team of volunteers supports this crucial flagship operation of HAC, especially during weekends and evenings. This role also takes the lead on recruiting, training, and scheduling volunteers for all HAC programs, to ensure a consistent volunteer experience. The Bookkeeper, Treasurer of the Board, and a contracted CPA work together, along with the Executive Director, to maintain financial oversight, budget preparation and compliance, and daily financial procedures.

Historically, HAC staff and board worked with individual "program chairs", who were responsible for the logistics, volunteer recruitment, budget compliance/allocation, and other event related tasks, from planning to day-of coordination, for their assigned program. HAC is moving away from having a single program chair responsible for each program, and is instead resourcing all HAC programs with a broad team of volunteer leaders that have been recruited and organized based on skill-sets and volunteer role interest areas. This is creating a more collaborative and sustainable approach to manage the workload of program management, increasing the quality of HAC program delivery, and is reducing the silo effect of each HAC program operating uniquely and independently from another.

In FY25, HAC programs will be run by HAC staff, with assistance from volunteers as described above, and oversight from the Executive Committee/Board. This cooperative system allows for checks and balances to be in place, and for no single individual to be held responsible for all facets of any given program. Major programmatic decisions are ultimately made by the staff, with the board ensuring compliance with strategic plans. This includes the programs in this contract proposal. The Executive Committee monitors & reviews progress of staff and volunteers through regular reports submitted for each program and area of operation by the Executive Director. The Executive Committee utilizes board members & board committees for advice and insight on governing responsibilities. Board members are encouraged to be actively engaged with either a program or committee area that they are specifically well suited for.

**Please explain how the organization is going to fundraise and build sustainability in FY25:**

The HAC treasurer, Bookkeeper, and Executive Director work with HAC staff and lead volunteers of each program to set annual program budgets and determine overall needs. These budgets are set during the late spring budget cycle and staff are required to adhere to these budgets throughout the fiscal year. Any changes to this budget must be submitted to the treasurer for review, followed by approval from the board of directors prior to allocation of additional funds or budgetary adjustments. In FY23, HAC began implementing a re-forecasting process for the annual budget based on actual revenue and expenses, in effort to be more responsive to any major changes or deviations that may occur during the fiscal year. Initiatives to adopt full-cost budgeting and operations, an emerging best practice in the non-profit sector, is also underway, allowing us to improve our communications with funders about the comprehensive costs of running our programs.

HAC is entering a new season of strategic planning, and the HAC Board has been working closely with HAC staff and lead volunteers to outline a set of specific, measurable, attainable, realistic, and time-bound (SMART) annual goals that will support the vision of the new strategic plan. The Board also attended a “Board Boot Camp” and “Organizational Assessment” program with the Executive Service Corps of the Triangle in spring 2023 that prepared us for further strategic planning and overall improved governance in FY25. A key component of our growth in FY25 will include offering more opportunities to garner feedback from our event partners, community stakeholders, artists, visitors, and the general public. It is important we check in regularly with those we serve to ensure our mission is still being executed to the best of its ability and that our programs, the majority of which are free & accessible to all, are aligning with the needs of our community.

Another key area of growth for the upcoming fiscal year, will be to expand staff once again to keep up with the demand for our programs. We will add a part-time Fundraising Coordinator position to grow our sustainer program, coordinate fundraising events with donors, and solicit corporate sponsors.

**Please explain how the organization plans to grow tourism in Hillsborough in FY25:**

The year-round flagship HAC events continue to see growth each year, bringing thousands of tourists to Hillsborough. With support from the Town, Tourism Board, and local businesses, we will be able to lead the charge in planning for the increase in crowds and grow our events. Our staff approaches each event strategically, notices growth trends, and plans accordingly. For FY25, we will partner with our local stakeholders to find creative solutions to event parking while integrating West Hillsborough. We will increase our efforts to advertise outside of Hillsborough and then ensure the infrastructure can support locals and tourists alike.

## Marketing Plan

***All HAC programs are promoted via strategic, organic, and paid marketing efforts that include:***

- *HAC website - 26,000+ views/year*
- *HAC social media (unpaid/organic) - 45,000+ average reach/year*
- *HAC monthly newsletter - 6,100+ distribution list with 45% open rate*
- *HAC quarterly donor newsletter - 100+ highly engaged distribution list*
- *On-site marketing at events and at the G&GS - 30,000-40,000+ visitors/year*
- *Printed signage and flyers*
- *Press packages with high-quality photography and announcements to extensive list of media outlets*
- *Postings to 20+ community calendar to ensure inclusion & awareness of tourism-driving events*
- *Collaborative cross-promotions with local businesses and community groups*
- *Radio and/or TV advertising as budget allows*
- *Print advertising or features in print publications as budget allows*
- *Paid social media advertising as budget allows*

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q1(July-Sept):**

**LFAW Q1:**

- The LFAW season bridges our fiscal years. We create a comprehensive marketing plan for each LFAW season to ensure consistency of event promotion & carry it through the calendar year. The marketing plan established in spring 2024 will be carried across FY24 to FY25. Tweaks may be made based on progression of the season so far and any feedback received from key stakeholders; funds received to invest in this program will be outlined in the FY25 budget and allocated strategically to ensure proper prioritization of use. Renewal of artist contracts may occur in Q1, as well as infrastructure repairs or replacement as needed.
- Marketing & advertising efforts include detailed information about:
  - o Each month's special entertainment and programming, such as artists, live music, and activities occurring around town.
  - o 21+ art walk venues / local businesses actively engaged in LFAW programming
  - o Recaps of previous month's arts programming + sneak peeks of what's to come for the next month, to entice repeat visitation and create urgency for returning
- An interactive map on the website will be updated and maintained to help event attendees find the various elements of entertainment during each LFAW
- A monthly one-pager with high-level overview of entertainment offerings + QR code linking back to website for interactive map and art walk venue listing details
- Distribution and restocking of the LFAW rack card designed at the beginning of the 2023 season to keep nearby visitors centers and other destinations receiving tourists aware of the program.
- Refreshed press package with updated photography announcing themes/entertainment line up for Q1 LFAW events

**SLW Q1:**

In Q1, we will confirm event logistics such as the date, route, and timeline. Our Program Director will prepare special event permits. Teasers and save-the-date marketing will begin via the website, social media, E-News, and flyers.

**HMP Q1:**

HMP marketing will be minimal during FY25 Q1. This will mostly be a debriefing time and an opportunity to remove any outdated marketing information about the 2024 HMP from the website; ensuring placeholder copy to maintain interest for the next HMP, but avoiding confusion with the public about when it is expected to occur again.

**G&GS Q1:**

The G&GS serves as an essential hub and resource for marketing material distribution, event information, and other tourism services - both for HAC programs and for Hillsborough's arts & culture events at large.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q2 (Oct-Dec):**

**LFAW Q2:**

In addition to the efforts described for Q1, Q2 will feature special attention on holidays & seasonal marketing strategies. Collaboration with other groups driving tourism and providing signature events during the holiday season, such as Visit Hillsborough, the Alliance for Historic Hillsborough, the Gingerbread Competition Team, and the Chamber. Q2 will round out the 2024 LFAW season. Other Q2 marketing efforts will communicate details about the "season finale" and a sneak peek/reminder to join us in Q3 for the 2025 LFAW season.

**SLW Q2:**

- Special event permits are submitted.
- Communications and administration begin for:
  - Contracted Entertainment
  - Food/beverage vendors
  - In-town Solstice Specials & Promotions
  - Community collaboration opportunities
- Marketing picks up:
  - Pre-event signage distribution begins
  - Flyer distribution continues
  - PR Package sent to 250+ local media outlets and arts partners
  - Social media posts/ads ramp up
  - WUNC Radio Ads begin
- On Nov. 1:
  - Lantern kits go on sale
  - Event registration opens
  - Solstice Market artist application goes live
- Website is updated to reflect:
  - Workshop & Lantern Kit Details
  - In-Town Solstice Specials & Promotions
  - Solstice Market Artists, Food/Bev, and Entertainment
  - Know Before You Go
- Lead volunteers prepare luminaries and event supplies.
- Day-of event volunteers are organized.

**HMP Q2:**

HMP marketing will be minimal during Q2. This will mostly be a time for updating and ensuring placeholder copy to maintain interest for the next HMP and re-engage stakeholders/internal groups early on in the planning process for the 2026 parade.

**G&GS Q2:**

The G&GS serves as an essential hub and resource for marketing material distribution, event information, and other tourism services - both for HAC programs and for Hillsborough's arts & culture events at large. During our busiest time of year and the holiday season, there is more information to be shared about special promotions and events occurring around town.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q3 (Jan-March):**

**LFAW Q3:**

In Q3 HAC develops updated branding, print materials, maps, and other marketing resources for venues to use as they finalize plans for the upcoming LFAW season. This quarter requires a lot of behind-the-scenes planning, communications, and alignment with LFAW partners and venues to ensure marketing materials are developed with accurate information and strategies to drive tourism. Artist contracts are signed for the 2025 season, when appropriate, and entertainment will be mapped out to build momentum strategically.

In January and February, the activities of participating Art Walk venues are cross-promoted on HAC social media and e-news channels, and the HAC website is updated to reflect this quieter, but still active, time period.

Towards the end of February, HAC will roll out the new marketing program for the upcoming 2025 season. This may include rack cards, posters, flyers, as well as other print and online materials. Community event calendars will be updated and press packages distributed. Artist applications for the Makers Market/nonprofit showcases open up through online, e-news, and social media promotions. Preparations for the HAC info booth at 2025 LFAWs, and any necessary equipment repairs or replacements will occur in this quarter to ensure a smooth and successful LFAW season.

- Ramping up in March, marketing & advertising efforts include detailed information about:
  - Themes and priorities for special entertainment and programming, such as artists, live music, and activities occurring around town.
  - 21+ art walk venues / local businesses actively engaged in LFAW programming
  - Sneak peeks of what's to come this season, to entice repeat visitation and create urgency for joining each month
- An interactive map on the website will be updated and maintained to help event attendees find the various elements of entertainment during each LFAW
- A monthly one-pager with high-level overview of entertainment offerings + QR code linking back to website for interactive map and art walk venue listing details
- Distribution of the 2025 LFAW rack card/flyer/brochure to inform nearby visitors centers and other destinations receiving tourists about the upcoming season
- 2025 LFAW press package with updated photography announcing major themes/entertainment line up/participating art walk venues this season.



**SLW Q3:**

Following the Solstice Lantern Walk, volunteers and staff members meet to debrief and reflect on successes and areas of improvement. Additionally, debrief surveys are sent to all volunteers and market vendors to collect feedback. Staff members compile ideas and begin organizing resources for next year.

**HMP Q3:**

HMP marketing will be minimal during Q3. This will mostly be a time for updating and ensuring placeholder copy to maintain interest for the next HMP and re-engage stakeholders/internal groups early on in the planning process for the 2026 parade. The “adopt a puppet” initiative may ramp up again towards the end of Q3, to begin identifying groups and partners who are willing to help manage puppets for the 2026 parade.

**G&GS Q3:**

Once reopened from a brief winter break, reengagement activities with the public will commence to drive traffic back to the G&GS and around historic Hillsborough. This reengagement will whet the public’s appetite for HAC’s 2025 calendar year programmatic activities with LFAW. Advertising regarding the new gallery exhibitions will also be implemented.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites’ success for Q4 (April-June):**

**LFAW Q4:**

- Continued marketing & advertising efforts include detailed information about:
  - Each month’s special entertainment and programming, such as artists, live music, and activities occurring around town.
  - 21+ art walk venues / local businesses actively engaged in LFAW programming
  - Recaps of previous month’s arts programming + sneak peeks of what’s to come for the next month, to entice repeat visitation and create urgency for returning each month
- An interactive map on the website will be updated and maintained to help event attendees find the various elements of entertainment during each LFAW
- A monthly one-pager with high-level overview of entertainment offerings + QR code linking back to website for interactive map and art walk venue listing details
- Distribution and restocking of the LFAW rack card designed at the beginning of the 2024 season to keep nearby visitors centers and other destinations receiving tourists aware of the program.
- Refreshed press package with updated photography announcing themes/entertainment line up for Q4 LFAW events

**SLW Q4:**

SLW marketing will be minimal during Q3. This is mostly a time for behind the scenes preparations for Q1.

**HMP Q4:**

Q4 will mark the point where the 2026 parade is one year out; marketing efforts around this message may begin, to ensure the public saves the date and is aware of the pending return of this beloved program. This will continue to be a time for updating and ensuring placeholder copy to maintain interest for the next HMP and re-engage stakeholders/internal groups early on in the planning process for the 2026 parade. The adopt-a-puppet initiative and other marketing campaigns may be implemented, to engage groups and partners who are willing to help manage a plan for the 2026 parade. Themes and elements of HMP may be integrated into other HAC programs/marketing efforts.

**G&GS Q4:**

Marketing efforts in Q4 will be focused on driving tourism to Hillsborough for LFAW, other town-wide summer events/activities, and the continually revamped array of local artwork available for sale.

**Detailed Proposed Budget - LFAW**

a. Item	b. Amount Needed via Contract Funding in FY25 (for each item)	c. Amount Contributed by Organization (for each item) <i>*Info provided here reflects all other earned &amp; contributed revenue sources from HAC budget for LFAW</i>	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	
1. LFAW Performance Services (9 months of entertainment, \$1800-\$2200 per month)	\$8,650		\$6,250	NC Arts Council	\$14,900
2. LFAW Makers Market Port-a-lets (6 months at \$419 each)	\$2,514				\$2,514
3. LFAW Licenses & Permits (venue reservations, signage permits, vendor fees)	\$700				\$700
4. LFAW Advertising - paid, print and digital/online	\$1,200		\$1,200	NC Arts Council	\$2,400

5. LFAW Marketing - Signage, Rack Cards, and Flyers; branded materials	\$250		\$250	NC Arts Council	\$500
6. Contracted services & equipment for capturing high-quality photography & videography of tourism-driving activities/LFAW	\$900		\$900	NC Arts Council	\$1,800
7. Equipment rental - lighting (Get Lit), other	\$100		\$2,000	Town of Hillsborough	\$2,100
8. Supplies for workshops & art-making activity tables at LFAW	\$400		\$400	NC Arts Council	\$800
9. Other supplies and program sustainability costs	\$300		\$300		\$600
9. Personnel & payroll for year-round LFAW program coordination & fulfillment of tourism services (allocated personal costs assoc. with sustaining operations of this program: 25% of Exec. Director's time, 35% of Program & Marketing Director's time, 10% of Gallery & Volunteer Manager's time, 15% of Bookkeeper's time)	\$6,486	\$25,274	\$24,576	NC Arts Council	\$56,336
10. Administrative expenses & overhead allocated for year-round LFAW program coordination & fulfillment of tourism services (including volunteer stewardship, web services & subscriptions, office supplies, occupancy & storage, insurance, etc.)	\$2,000	\$4,324	\$5,000	NC Arts Council	\$11,324

11. LFAW Volunteer hours Est. 500 hrs./FY @ \$29.95 (Nat. Average)		\$14,975		Information shared for awareness of volunteer investment, <u>not added into budget totals.</u>	
<b>TOTALS</b> (sum of each column)	<b>\$23,500</b>  <b>(9 months of full Last Fridays &amp; the Art Walk programming, 12 months of services)</b>	\$44,299	\$40,876	NC Arts Council; Town of Hillsborough	\$93,974 TOTAL PROGRAM INVESTMENT COSTS

#### Detailed Proposed Budget - Solstice Lantern Walk

a. Item	b. Amount Needed via Contract Funding in FY25 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
		<i>*Info provided here reflects all other earned &amp; contributed revenue sources from HAC budget for HMP/HMM</i>	Amount	Source	
1. Sanitation	\$420				\$420
2. Equipment rental: Lighting/Heating	\$600		\$1,000	Town of Hillsborough	\$1,600
3. Performance Services (pre and post walk entertainment)	\$1,275				\$1,275
4. ticketing fees	\$555				\$555
5. Spiral of Light Supplies/Artist Honorarium/Planning/Building	\$300				\$300

6. Workshop Instructor Fees & Supplies	\$500				\$500
7. Supplies (lantern kits, ground luminaries, etc.)	\$1,000	\$950			\$1,950
8. Permits (Town, County, Signage, Vendors)	\$475				\$475
9. Marketing Services, Advertising, & Promotions	\$1,000	\$630			\$1,630
10. Technology Services & Web Software - SLW specific	\$200	\$1,046			\$1,246
11. Printing & Copying - SLW specific	\$300	\$334			\$634
12. Insurance - SLW specific	\$200	\$280			\$480
13. Office, Storage, & Retail Space - SLW specific	\$175	\$2,310			\$2,485
14. Portion of Staff Salaries Specifically Required to Operate SLW	\$3,000	\$48,961			\$51,961
<b>TOTALS</b> (sum of each column)	<b>\$10,000</b>	\$54,511	\$1,000	Town of Hillsborough	\$65,511 TOTAL PROGRAM INVESTMENT COSTS

#### Detailed Proposed Budget - HMP/HMM/WOA

a. Item	b. Amount Needed via Contract Funding in FY25 (for each item)	c. Amount Contributed by Organization (for each item)  <i>*Info provided here reflects all other earned &amp; contributed revenue sources from HAC budget for HMP/HMM</i>	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)

1. Production expenses, equipment rental, storage, & transportation for HMP puppets & HMM event supplies	\$500	\$500			\$1,000
2. HMP Performance Services	\$3,250	\$3,250			\$6,500
3. HMP/HMM Advertising - paid, print and digital/online	\$500	\$500			\$1,000
4. HMP/HMM Marketing - Signage, Postcards, and Flyers; branded materials	\$500	\$500			\$1,000
5. HMP & HMM Port-a-lets	\$600				\$600
6. HMP & HMM Licenses & Permits (venue reservations, signage permits, vendor fees)	\$1,000				\$1,000
7. Teaching instructors & supplies for art-making/puppet building workshops & activities in lead up to HMP		\$500			\$500
8. Personnel & payroll for HMP program coordination & fulfillment of tourism services (allocated personal costs assoc. with sustaining operations of this program: 20% of Exec. Director's time, 25% of Program & Marketing Director's time, 10% of Gallery & Volunteer Manager's time, 15% of Bookkeeper's time)	\$2,000	\$26,432			\$28,432

9. Administrative expenses & overhead allocated for year-round LFAW program coordination & fulfillment of tourism services (including volunteer stewardship, web services & subscriptions, office supplies, occupancy & storage, insurance, etc.)	\$1,650	\$3,808			\$5,458
12. Volunteer hours Est. 800 hrs. @ \$29.95 (Nat. Average)		\$23,960		Information shared for awareness of volunteer investment, <u>not added into budget totals.</u>	
<b>TOTALS</b> (sum of each column)	<b>\$10,000</b> <b>(\$5,000 split between FY25 &amp; FY26 for Handmade Parade &amp; Market)</b>	\$35,490			\$45,490 TOTAL PROGRAM INVESTMENT COSTS

#### Detailed Proposed Budget - G&GS

a. Item	b. Amount Needed via Contract Funding in FY25 (for each item)	c. Amount Contributed by Organization (for each item)  <i>*Info provided here reflects all other earned &amp; contributed revenue sources from HAC budget for G&amp;GS</i>	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)

1. Marketing & operations for the Gallery & Gift Shop - physical signage, displays, materials, advertising, etc.	\$815				\$815
2. Retail services supplies & equipment - merchandising supplies, technical upgrades, fees	\$185	\$9,278			\$9,463
3. Personnel & payroll for G&GS program coordination & fulfillment of tourism services (allocated personal costs assoc. with sustaining operations of this program: 25% of Exec. Director's time, 10% of Program & Marketing Director's time, 70% of Gallery & Volunteer Manager's time, 50% of Bookkeeper's time)	\$2,000	\$65,604			\$67,604
4. Administrative expenses & overhead allocated for year-round G&GS program coordination & fulfillment of tourism services (including volunteer stewardship, web services & subscriptions, office supplies, occupancy & storage, insurance, etc.)	\$2,000	\$19,486			\$21,486
5. Volunteer hours Est. 1200 hrs. @ \$29.95 (Nat. Average)		\$35,940		Information shared for awareness of volunteer investment, <u>not added into budget totals.</u>	



<b>TOTALS</b> (sum of each column)	<b>\$5,000 (for year-round operations of G&amp;GS)</b>	\$85,777			\$90,777 TOTAL PROGRAM INVESTMENT COSTS (Does not include artist commissions covered through consignment sales of artwork)
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### Signatures

I hereby certify that the information contained in this proposal is true and accurate to the best of my knowledge and that I have reviewed the Town of Hillsborough's Non-profit Guidelines and our organization is in compliance.

#### EXECUTIVE DIRECTOR

Signature: 	Date: 3/27/24
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Printed Name: Heather Tatreau

#### BOARD CHAIRPERSON

Signature: 	Date: 3/27/24
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Printed Name: Joshua Collins

## FY25 Tourism Contract Budget Increase Justification Form: Last Friday and The Art Walk

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

### Request Overview:

We need to increase our budget for Last Fridays and the Art Walk to keep up with rising costs and increased crowds. Having the right number of port-a-lets and staff members at our high traffic events is crucial to serving our attendees. We need to increase our advertising and marketing budget to meet rising costs and continue to attract tourists from outside of the town with targeted ads. These essential needs will cost a combined total of \$2,200 more than last fiscal year and support tourism in Hillsborough.

We would like to increase the number of performers that we hire at our busiest LFAW events. Currently, we only have enough budgeted for one hour of live music on our main lawn each month. Some possible uses of more money in our performance budget are an increase in hours we offer music on the main lawn, hiring a dance company to teach a group lesson to attendees, and providing entertainment in West Hillsborough during LFAW. More entertainment means that attendees will stay longer and ultimately, will spend more tourist dollars. We also see this as a way to expand LFAWs and encourage non-residents to see Hillsborough as a destination for weekend arts and entertainment. The more we offer, the more we are able to appeal to a wider audience. We are requesting an increase of \$2,400 to our performance budget in FY25.

We would like to hire professional photographers more often at our LFAW events to capture the spirit of the events. These photographs can be used for promotion on our website, in the news, and on marketing materials. Video content can be shared immediately via social media to increase attendance. Having professional photographs have been instrumental in gathering the visual materials needed to apply for funding and advertise events. With more bandwidth, we can cover more of the events around town and help promote local businesses. We are requesting an increase of \$400 to our photography budget in FY25.

### Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

Performance Services - 2

Port-a-lets - 1

Advertising and Marketing - 1

Photography - 2

Personnel - 1

### Line-items where funds are requested (number from budget and description of line-item):

Line items 1, 2, 4, 5, 6, 9 of the LFAW budget:

1. Performance Services - \$2,400 increase requested

2. Port-a-lets - \$314 increase requested

4-5. (and line 5 combined) Advertising and Marketing - \$450 increase requested

6. Photography - \$400 increase requested  
9. Personnel - \$1,436 increase requested  
TOTAL increase requested - \$5,000

Describe request:

Please see the overview section above.

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

The monthly LFAW outlined above is directly connected to, and an example of, the following strategies outlined in the Town of Hillsborough's current strategic tourism plan:

- Incrementally grow the tourism base and expand the types of tourists that visit Hillsborough by providing information, creative marketing, consistent communications, and interesting arts, music, outdoor, and cultural events.
- Market Hillsborough as a beautiful and charming small town with a long, rich history, vibrant art and music scene, great outdoor recreation opportunities, and delicious food and beverage.
- Maintain and work to expand the economic vibrancy and diversity in business types of our town-wide commercial community.
- Foster and support long term strategic tourism planning while continuing to grow and improve the Tourism Program.
- Maintain a vibrant, friendly, clean, and attractive destination to keep visitors coming here and returning year after year.

Alternatives & impact if request is not funded:

If the increased funding for port-a-lets, personnel, and advertising/marketing is not funded, we will not be able to keep up with demand for LFAW. Staff will need to spend time securing funding elsewhere, jeopardizing the quality of our programming.

If the performance budget is not increased, we will maintain our offerings from last season. However, without growth in programming, attendees may lose interest and crowds may not be as robust. We have an opportunity for meaningful growth with this budget increase. We also have an opportunity for documenting our impact by hiring more photographers for LFAWs. Without an increase in budget here, we risk stagnation.

Additional information:

Thank you for your support of the Hillsborough Arts Council over the years. Our mission and purpose for existence is to build our community through the arts, and partnership with the Town of Hillsborough is essential for us to fulfill the needs of the artists, visitors, and arts supporters whom we serve. We are honored to be part of the creative fabric & identity of Hillsborough, and we look forward to working together to ensure Hillsborough is recognized across the state as a premier tourist destination and a historical, cultural, and artistic gem.



## FY25 Tourism Contract Budget Increase Justification Form: Solstice Lantern Walk

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

### Request Overview:

The Solstice Lantern Walk (SLW) is one of the most widely known cultural events in Hillsborough, as demonstrated by a feature in Our State Magazine. This event has a strong track record of bringing thousands of visitors, residents, and tourists to town to enjoy the handmade lanterns and share their own creations. We have helped make Hillsborough a holiday cultural destination with the continuation of last year's successful Maker Market, the addition of food trucks, having greater collaboration with the Tourism Board, Alliance for Historic Hillsborough, local businesses/restaurants, Hillsborough's impressive network of artists, and more.

For the past two fiscal years, the Tourism Board has supported the annual Solstice Lantern Walk in the amount of \$10,000 each year through a special project grant. This funding has proved essential to the operation and growth of the event. This event grew from 3,000 to 4,500 attendees in the last year alone, with an estimated 3,105 tourists attending the 2023 SLW. We anticipate continued growth, and thus, need continued funding for this yearly event. We respectfully request sustaining support in our Tourism Board Partnership Contract in the amount of \$10,000 to continue to offer this event each year.

### Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

Sanitation - 1  
Equipment rental - 1  
Performance services - 1  
Ticketing fees - 1  
Spiral of Light supplies, planning, building - 1  
Workshop instructor fees and supplies (lantern building) - 1  
Supplies (lantern kits, ground luminaries, etc) - 1  
Permits - 1  
Marketing services - 1  
Technology services - 1  
Printing and copying - 1  
Insurance - 1  
Office, storage, retail space (SLW specific) - 1  
Portion of staff salaries specifically required to operate SLW - 1

Each of these line items are essential for providing the level of quality we have built into the reputation of this event, which keeps attendees coming back year over year and attracting new participants.

Line-item where funds are requested (number from budget and description of line-item):

Line items 1-14 of the SLW budget:

1. Sanitation - \$420
2. Equipment rental (lighting/heating) - \$600
3. Performance services (entertainment) - \$1,275
4. Ticketing fees - \$555
5. Spiral of Light supplies, planning, building - \$300
6. Workshop instructor fees and supplies (lantern building) - \$500
7. Supplies (lantern kits, ground luminaries, etc) - \$1,000
8. Permits - \$475
9. Marketing services - \$1,000
10. Technology services - \$200
11. Printing and copying - \$300
12. Insurance - \$200
13. Office, storage, retail space (SLW specific) - \$175
14. Portion of staff salaries specifically required to operate SLW - \$3,000

TOTAL request - \$10,000 (total budget = \$65,511)

Describe request:

We are asking for support with a fraction of the overall costs that HAC incurs to operate this essential tourism event. Additional funding comes from the Town of Hillsborough and HAC fundraising efforts in the amount of \$55,511 to meet the total cost to run this program. HAC has proven to successfully invest funding from the Tourism Board's Special Project Grant for the operation of the Solstice Lantern Walk over the past two years. We are now asking for sustained funding to help ensure we can continue to drive revenue, tourism, and community impact with this yearly event.

Our overall operation plan will remain the same in FY25. However, each year, we seek to make the event even better and more efficient in its operation. SLW 2024 will have more designated viewing areas, off-ramps for shorter walk alternatives, and we will revisit the route to consider ways to include West Hillsborough.

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

The yearly Solstice Lantern Walk outlined above is directly connected to, and an example of, the following strategies outlined in the Town of Hillsborough's current strategic tourism plan:

- Incrementally grow the tourism base and expand the types of tourists that visit Hillsborough by providing information, creative marketing, consistent communications, and interesting arts, music, outdoor, and cultural events.
- Market Hillsborough as a beautiful and charming small town with a long, rich history, vibrant art and music scene, great outdoor recreation opportunities, and delicious food and beverage.
- Maintain and work to expand the economic vibrancy and diversity in business types of our town-wide commercial community.
- Foster and support long term strategic tourism planning while continuing to grow and improve the Tourism Program.

- Maintain a vibrant, friendly, clean, and attractive destination to keep visitors coming here and returning year after year.

Alternatives & impact if request is not funded:

Tourism Board funding of a portion of the operating costs of the Solstice Lantern Walk is essential to keeping this event going, maintaining a quality experience to meet participant expectations, and addressing the challenges of inevitable growth. Without a yearly investment of \$10,000 from the Tourism Board, our staff would need to reallocate their time toward finding private funding. This would take away from crucial planning time needed to execute this event. I fear that the quality of the SLW would suffer, which would have a negative impact on tourism in Hillsborough.

Additional information:

Thank you for your support of the Hillsborough Arts Council over the years. Our mission and purpose for existence is to build our community through the arts, and partnership with the Town of Hillsborough is essential for us to fulfill the needs of the artists, visitors, and arts supporters whom we serve. We are honored to be part of the creative fabric & identity of Hillsborough, and we look forward to working together to ensure Hillsborough is recognized across the state as a premier tourist destination and a historical, cultural, and artistic gem.

For more details about the SLW, please refer to our 2024 end of project report.



**STAFF REPORT**  
Hillsborough Tourism Board  
April 10, 2024

**PRESENTER/INFORMATION CONTACT**

Tourism Program Manager, Shannan Campbell

**ITEM TO BE CONSIDERED**

**Subject:** OC Historical Museum Contract Renewal for FY25 (Visitor Services & Operations)

**Attachments:**

1. OCHM Contract Response and Budget
2. OCHM Budget Justification Forms

**Background:**

The Tourism Program has contracted with the OCHM since FY17 to provide a unique, local, history museum that's free to the public with regular operating hours and special events. The museum has asked for steady increases based on exhibits, staffing, and operations.

**Summary, key points, and questions:**

- The OC Historical Museum is asking for \$57,600 in FY25, a \$1,500 increase over the FY24 contract amount of \$56,100.
- Budget Justification Forms are included explaining expanded needs in the following budget lines:
  - Personnel (cost of living adjustment) \$1,500
  - Marketing (increased cost of printing and digital marketing) \$500

**Staff recommendation and comments:**

None. There's a slight discrepancy between the totals in budget justifications (\$1,500) and increase amount from FY24 (\$2,000). The OCHM was able to reduce funds needed in other line items for a savings of \$500.





## FY 2025 Contract Scope of Work Response

### OC Historial Museum - Visitor Services & Operations

#### Organization Information

Organization Name: Historical Foundation of Hillsborough and Orange County (Orange County Historical Museum)

Contact Person and Title: Catie Atkinson, Site Manager

Contact Person Email: [manager@orangehistorync.org](mailto:manager@orangehistorync.org)

Contact Person Phone: 919-732-2201

Organization Street Address: 201 N Churton St

City: Hillsborough

State: NC

ZIP Code: 27278

Organization's Annual Operating Budget: \$ 154,677

#### General Contract Information

Contract Name: Orange County Historical Museum – Visitor Services

Month(s) or Date(s) in which Proposal Project/Services will take place: **JULY 1<sup>st</sup>, 2024- JUNE 30<sup>th</sup>, 2025**

#### Outline/Overview of Scope of Work

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q1(July-Sept):**

- Have Museum open to the public and free of charge 6 days a week with Wednesday available by appointment.
- Continue to promote the special exhibit on display, "Working for a Living: A History of Trades in Orange County."
- Further develop the children and family gallery to be themed around 1823 Hillsborough with age appropriate educational hands-on activities based on actual business and people from 1823 Hillsborough. This children and family gallery continues to provide a much-needed space for local and visiting tourist families and their children, and is currently the only space of its kind in the county.
- Partner with the Chapel Hill Historical Society as part of our mission to present a holistic history of Orange County through exhibits and programs.
- Host at least two free programs during Q1 that either tie into the special exhibit "Working for a Living" or explore aspects of local or regional history.
- Coordinate at least one tour for community/special interest groups or formal education groups through Orange County Public Schools or other school systems.
- Maintain the Heritage Home Sign project to provide or replace white historic signs to residents of Historic Hillsborough, thus providing information on historic homes to all visitors.
- Continue to monitor Museum and off-site visitors and their comments through post-event surveys, informal conversations, and other methods.
- Share collection pieces through social media to publicize lesser known histories and stories of Hillsborough and Orange County.
- Assist research with research requests by allowing access to research files, archives, and collections.
- Continue to work to increase visitor engagement with Museum exhibits, programs, events, and other outreach by 10% from projected FY 23-24 numbers.

- Work collaboratively with partner organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Participate in meetings with other nonprofit and organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Ensure that any publicity/printed materials acknowledge the Tourism Board funding and that such materials are made available to the general public at sites around Hillsborough and Orange County throughout the quarter.
- Display Visitor Services materials in the Museum to assist the Visitors Center and Tourism Program with providing resources for visitors.
- Provide quarterly report to the Tourism Board on the status of activities outlined and current communications and marketing efforts.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q2 (Oct-Dec):**

- Have Museum open to the public and free of charge 6 days a week with Wednesday available by appointment.
- Continue to promote the special exhibit on display, ‘Working for a Living.’
- Plan and develop the next special exhibit to be opened in early 2025 by working with community members to crowdsource information and artifacts.
- Further develop the children and family gallery to be themed around 1823 Hillsborough with age appropriate educational hands-on activities based on actual business and people from 1823 Hillsborough. This children and family gallery continues to provide a much-needed space for local and visiting tourist families and their children, and is currently the only space of its kind in the county.
- Partner with the Chapel Hill Historical Society as part of our mission to present a holistic history of Orange County through exhibits and programs.
- Host at least two free programs during Q2 that either tie into the special exhibit “Working for a Living” or explore aspects of local or regional history.
- Coordinate at least one tour for community/special interest groups or formal education groups through Orange County Public Schools or other school systems.
- Maintain the Heritage Home Sign project to provide or replace white historic signs to residents of Historic Hillsborough, thus providing information on historic homes to all visitors.
- Continue to monitor Museum and off-site visitors and their comments through post-event surveys, informal conversations, and other methods.
- Share collection pieces through social media to publicize lesser known histories and stories of Hillsborough and Orange County.
- Assist research with research requests by allowing access to research files, archives, and collections.
- Continue to work to increase visitor engagement with Museum exhibits, programs, events, and other outreach by 10% from projected FY 23-24 numbers.
- Work collaboratively with partner organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Participate in meetings with other nonprofit and organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.

- Ensure that any publicity/printed materials acknowledge the Tourism Board funding and that such materials are made available to the general public at sites around Hillsborough and Orange County throughout the quarter.
- Display Visitor Services materials in the Museum to assist the Visitors Center and Tourism Program with providing resources for visitors.
- Provide quarterly report to the Tourism Board on the status of activities outlined and current communications and marketing efforts.

Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q3 (Jan-March):

- Have Museum open to the public and free of charge 6 days a week with Wednesday available by appointment.
- Install and promote new special exhibit to be opened in early 2025.
- Further develop the children and family gallery to be themed around 1823 Hillsborough with age appropriate educational hands-on activities based on actual business and people from 1823 Hillsborough. This children and family gallery continues to provide a much-needed space for local and visiting tourist families and their children, and is currently the only space of its kind in the county.
- Partner with the Chapel Hill Historical Society as part of our mission to present a holistic history of Orange County through exhibits and programs.
- Host at least two free programs during Q3 that either tie into the special exhibit or explore aspects of local or regional history.
- Coordinate at least one tour for community/special interest groups or formal education groups through Orange County Public Schools or other school systems.
- Plan the annual fundraising campaign to launch in April.
- Maintain the Heritage Home Sign project to provide or replace white historic signs to residents of Historic Hillsborough, thus providing information on historic homes to all visitors.
- Continue to monitor Museum and off-site visitors and their comments through post-event surveys, informal conversations, and other methods.
- Share collection pieces through social media to publicize lesser known histories and stories of Hillsborough and Orange County.
- Assist research with research requests by allowing access to research files, archives, and collections.
- Continue to work to increase visitor engagement with Museum exhibits, programs, events, and other outreach by 10% from projected FY 23-24 numbers.
- Work collaboratively with partner organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Participate in meetings with other nonprofit and organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Ensure that any publicity/printed materials acknowledge the Tourism Board funding and that such materials are made available to the general public at sites around Hillsborough and Orange County throughout the quarter.
- Display Visitor Services materials in the Museum to assist the Visitors Center and Tourism Program with providing resources for visitors.
- Provide quarterly report to the Tourism Board on the status of activities outlined and current communications and marketing efforts.

**Please explain generally how the organization is going to perform the duties requested in the FY2025 Contract Scope of Work Update during Q4 (April-June):**

- Have Museum open to the public and free of charge 6 days a week with Wednesday available by appointment.
- Continue to promote new special exhibit.
- Further develop the children and family gallery to be themed around 1823 Hillsborough with age appropriate educational hands-on activities based on actual business and people from 1823 Hillsborough. This children and family gallery continues to provide a much-needed space for local and visiting tourist families and their children, and is currently the only space of its kind in the county.
- Partner with the Chapel Hill Historical Society as part of our mission to present a holistic history of Orange County through exhibits and programs.
- Host at least two free programs during Q4 that either tie into the special exhibit or explore aspects of local or regional history.
- Coordinate at least one tour for community/special interest groups or formal education groups through Orange County Public Schools or other school systems.
- Launch annual fundraising campaign, which will be finished by the end of the fiscal year.
- Maintain the Heritage Home Sign project to provide or replace white historic signs to residents of Historic Hillsborough, thus providing information on historic homes to all visitors.
- Continue to monitor Museum and off-site visitors and their comments through post-event surveys, informal conversations, and other methods.
- Share collection pieces through social media to publicize lesser known histories and stories of Hillsborough and Orange County.
- Assist research with research requests by allowing access to research files, archives, and collections.
- Continue to work to increase visitor engagement with Museum exhibits, programs, events, and other outreach by 10% from projected FY 23-24 numbers.
- Work collaboratively with partner organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Participate in meetings with other nonprofit and organizations to ensure that efforts to bolster Hillsborough and Orange County tourism are coordinated.
- Ensure that any publicity/printed materials acknowledge the Tourism Board funding and that such materials are made available to the general public at sites around Hillsborough and Orange County throughout the quarter.
- Display Visitor Services materials in the Museum to assist the Visitors Center and Tourism Program with providing resources for visitors.
- Provide quarterly report to the Tourism Board on the status of activities outlined and current communications and marketing efforts.

**Outline/Overview of Job Tasks and Schedules**

Please explain generally how the organization plans to accomplish all goals associated with the scope of work, including but not limited to, marketing, hiring, volunteer recruitment, exhibit development, event tasks, etc.

**Volunteer Recruitment:**

Throughout the past several years, the Museum recruited volunteers through local universities, high schools, and the community to assist with research, exhibits, collections work, and visitor services. The Museum will continue to recruit volunteers throughout FY24-25 by contacting community members through social media, e-newsletter blasts, student volunteer and internship programs, and via the website VolunteerMatch.com, in an effort to increase the number of volunteers as well as the scope of work they perform.

**Exhibit Development:**

The Museum will work with community groups and other stakeholders to develop a new special exhibit focused on the history of youth and community sports in Orange County for early 2025. We were approached by these groups and asked if we would be willing to work with them to create an exhibit. It is our goal to develop exhibits that are engaging and relatable for a wide audience. We want the community to feel a sense of ownership over the Museum, so working with this group was a perfect fit. For the first half of FY 24-25, Museum staff will work with these groups to source artifacts and information and to design the exhibit.

The museum also continues to provide the Chapel Hill Historical Society with dedicated exhibit space. In March 2024 they installed their new exhibit, "The Business of Franklin Street" which was done in conjunction with our special exhibit "Working for a Living." The Chapel Hill Historical Society will periodically update their exhibit space with new exhibits showcasing the history of Chapel Hill.

While the themes of the permanent exhibit remain the same, we periodically update some of the artifacts displayed, giving even repeat visitors something new to see.

**Marketing:**

Exhibits and programs will be promoted through the Museum website, social media pages, press releases, rack cards, e-newsletters, and radio shows. Targeted exhibit, program, and event promotion will continue to occur by posting in special interest groups on social media, such as the 'Chapel Hill and Carrboro Foodies' group on Facebook.

**Last Friday Art Walk:**

The Museum will participate in Last Friday Art Walk events by extending Museum hours on these days to provide an additional location for participants to visit. Staff will also work to develop activities for participants to engage in on-site.

**Programs and Events:**

The Museum will host a minimum of two free programs each quarter, with the possibility of additional free programs or paid events. Free programs will be lecture-style talks from experts in fields related to local or regional history. The Museum will also continue to partner with the Chapel Hill Historical Society and other partner organizations to co-host programs. Paid events, such as historic cocktail tastings or larger conference-like events, will be scheduled periodically and relate to the theme of the special exhibit or local history. Staff will continue to monitor program and event attendance and feedback to plan programs and events that appeal to a wide variety of people and attract visitors to Hillsborough.

**Please explain how the organization is going to fundraise and build sustainability in FY25:**

In an effort to increase the development work the Museum is able to do, the board will recruit an individual(s) to do development work on a volunteer basis. This individual(s) will ideally be a member of the community who has significant social connections within the community and is knowledgeable of lucrative avenues in which to pursue development opportunities. At this time, the Museum is unable to sustain a paid development position, but we are hopeful that having a dedicated development volunteer will increase funds enough to hire a development position in the future.

In addition, the Museum will continue to plan and launch our annual fundraising campaign in April 2025 which features a variety of fundraising events at different levels of giving to appeal to a wider audience as well as solicit donations throughout the year at programs and events and through digital communications.

**Please explain how the organization plans to grow tourism in Hillsborough in FY25:**

Currently, approximately 75% of our on-site visitors live outside of Orange County. In FY25, we will continue to work to increase the number of tourists who visit the Museum by continuously updating our website to show new exhibits and programs and posting frequently on social media so those planning trips to the area recognize the Museum as a tourist destination. Additionally, we will distribute physical marketing material to regional museums and historic sites to increase visibility and promote Museum exhibits and programming with statewide organizations, such as the Federation of North Carolina Historical Societies. Finally, we will continue to produce high-quality exhibits and programming and ensure visitors have an exceptional experience, as word of mouth is often the most effective marketing tool.

**Marketing Plan**

The Museum's primary outreach/marketing is through social media platforms, the Museum's website, professionally printed rack cards, and an e-newsletter sent through iContact. Posts on social media accounts promote the permanent and special exhibits, collections, programs, and events, and serve as a way to recruit volunteers and interact with other organizations. The museum also has a YouTube channel where recordings of past programs and other content are available.

During all quarters, all Museum programs will be promoted through these methods, and the Museum will ensure that all brochures and other publicity for Tourism Board sponsored/funded activities are made available to the public in the Museum.

Throughout the fiscal year, we will utilize a mix of traditional and digital marketing as well as word-of-mouth promotion within a 30-mile radius, including but not limited to:

- Rack cards for the Museum, educational tours, and the special exhibit that will be distributed to organizations in Hillsborough, Chapel Hill, Carrboro, Mebane, Durham, and Raleigh.
- Social media promotion via Museum accounts, with cross-posting in special interest groups, and amplified by Board Members and volunteers to extend reach.
- Press releases to area magazines and newspapers.
- Co-marketing with sponsors and partner organizations via their digital marketing and social media channels.
- Adding programs and events to local event calendars, both online and in print.
- Press releases to area magazines and newspapers.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q1(July-Sept):**

- Provide print marketing material to partner organizations around Hillsborough and Orange County advertising the Museum in general as well as the special exhibit and tours.
- Promote current special exhibit and Museum programs via the methods listed above.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q2 (Oct-Dec):**

- Provide print marketing material to partner organizations around Hillsborough and Orange County advertising the Museum in general as well as the special exhibit and tours.
- Promote current special exhibit and Museum programs via the methods listed above.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q3 (Jan-March):**

- Provide print marketing material to partner organizations around Hillsborough and Orange County advertising the Museum in general as well as the special exhibit and tours.
- Promote current special exhibit and Museum programs via the methods listed above.

**Please explain generally how the organization is going to provide the minimum requested marketing materials as well as any additional marketing and materials that will ensure the events/programs/projects/service/historic sites' success for Q4 (April-June):**

- Provide print marketing material to partner organizations around Hillsborough and Orange County advertising the Museum in general as well as the special exhibit and tours.
- Promote current special exhibit and Museum programs via the methods listed above.

## Detailed Proposed Budget

a. Item	b. Amount Needed via Contract Funding in FY23 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	
i.e. Personnel Costs- .5 FTE- Part Time Coordinator (10 hours p/w)	Ex: \$6,500	Ex: \$1,000	Ex: \$500	Non-profit Grant	\$8,000
1. Operations- Utilities/Rent/Facilities/Building and Grounds	\$	\$	\$10,000	Town of Hillsborough	\$10,000
2. Operations- Staffing/Administration	\$56,100	\$22,257	\$37,000	Orange County Outside Agency	\$115,357
3. Operations- Insurance (D&), Liability, Collections	\$	\$2,000	\$		\$2,000
4. Marketing (Social Media/Digital/Website/Advertising)	\$1,000	\$250	\$		\$1,250
5. Technology	\$	\$2,500	\$		\$2,500
6. Collections	\$	\$1,100	\$		\$1,100
7. Banking Fees	\$	\$250	\$		\$250
8. Staff Development, Travel, and Training	\$	\$500	\$		\$500
9. Supplies and Equipment	\$500	\$500	\$1,500	Orange County Outside Agency	\$3,000
10. Postage and Shipping	\$	\$100	\$		\$100
11. Printing/Copying	\$	\$500	\$		\$500
12. Gift Shop	\$	\$1,550	\$		\$1,550
13. Subscriptions	\$	\$400	\$		\$400
14. Exhibits	\$	\$1,100	\$5,000	Orange County Outside Agency	\$6,100



15. Programs	\$	\$4,300	\$1,500		\$5,800
16. Fundraising	\$	\$2,770	\$		\$2,770
17. Auditor	\$	\$1,500	\$		\$1,500
<b>TOTALS</b> (sum of each column)	\$57,600	\$42,077	\$55,000		\$154,677

a. Item	b. Amount Needed via Contract Funding in FY23 (for each item)	c. Amount Contributed by Organization (for each item)	d. Other Funding Sources		e. Total Contract Budget (add columns b-d)
			Amount	Source	

\*\* PLEASE ADD ROWS AND/OR PROVIDE ADDITIONAL SHEETS IF THERE IS NOT ENOUGH ROOM TO ACCOMMODATE YOUR FULL BUDGET \*\*

## Signatures

I hereby certify that the information contained in this proposal is true and accurate to the best of my knowledge and that I have reviewed the Town of Hillsborough's Non-profit Guidelines and our organization is in compliance.

EXECUTIVE DIRECTOR N/A

Signature:	Date:
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Printed Name:
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BOARD CHAIRPERSON

Signature: 	Date: 3/27/24
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Printed Name: Tonya Brami
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GRANT CONTACT PERSON (if different than Executive Director)

Signature: <i>Catie Atkinson</i>	Date: 3/27/24
Printed Name: Catie Atkinson	

## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year. **Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview: The Orange County Historical Museum is asking for an increase of \$500 in funding for marketing bringing total marketing funding to \$1,000.

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

Marketing = Should Do

Increasing funding for marketing expenses is less vital, but still important. With the cost of printed goods increasing with inflation and more focus put on digital marketing and advertising campaigns, our overall marketing costs are increasing. Current marketing efforts will continue regardless of funding increase.

Line-item where funds are requested (number from budget and description of line-item):

Line 4. Marketing - \$1,000

Describe request:

The cost of producing printed marketing materials has increased over the past several years with inflation. In order to continue producing the same amount of printed marketing materials, it is necessary to increase our marketing budget. Additionally, we would like to increase our marketing budget to allow us to pursue other paid marketing opportunities, such as paid social media campaigns and paid advertisements in publications such as INDY. These additional marketing opportunities would allow us to reach new audiences that may not have been exposed to the Museum, and by extension Hillsborough, before.

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

This request relates to the first two strategies established by the Tourism Board to support their goal of making Hillsborough the premier North Carolina tourist destination.

- Incrementally grow the tourism base and expand the types of tourists that visit Hillsborough by providing information, creative marketing, consistent communications, and interesting arts, music, outdoor, and cultural events.
- Market Hillsborough as a beautiful and charming small town with a long, rich history, vibrant art and music scene, great outdoor recreation opportunities, and delicious food and beverage.

This request directly links to the above strategies by allowing us to increase the marketing materials we are able to produce for the Museum, thus increasing the tourism marketing efforts for the Town overall.

Alternatives & impact if request is not funded:

If the request is not funded, marketing materials will continue to be produced, but at a lesser quantity, with less digital marketing being done and a conservative number of printed marketing materials being ordered.

Additional information:

Include any pertinent information that wasn't already covered about the request.

## FY25 Tourism Contract Budget Increase Justification Form:

Explain any increase in the requested contract line item amounts or any added line items from the previous fiscal year.

**Use multiple sheets for multiple budget increases or requests.** For example, if you're asking for additional funds for marketing AND additional funding for a new staff member, you would submit two separate budget justification forms, one for each line item.

Request Overview : The Orange County Historical Museum is asking for an increase of 4% to funding for staffing and administration bringing the line item funding amount from \$54,600 to \$56,100.

Prioritize Requests as 1, 2, or 3 (1=Must do; 2=Should do; and 3=Could do):

Staffing and Administration = 1 Must Do

Increasing staff salaries to stay in line with the living wage is vital for staff retention. The 4% increase in funding for staffing and administration reflects an increase in the cost of living due to inflation. It is necessary for staff retention to keep wages competitive.

Line-item where funds are requested (number from budget and description of line-item):

Line 2 Staffing and Administration - \$56,100

Describe request:

The staff at the Orange County Historical Museum is vital to the experience of visitors. Staff elevates the basic experience of walking around the museum to one that is engaging, having personal conversations with visitors, telling them stories, and bringing the history to life. Without knowledgeable, personable, and passionate staff, the Museum would not be as successful as it is. It is vital to retain current staff by paying them a competitive and living wage.

Discuss how the request links to the Strategic Tourism Plan Goals/Implementation Projects:

This request relates to the first two strategies established by the Tourism Board to support their goal of making Hillsborough the premier North Carolina tourist destination.

- Incrementally grow the tourism base and expand the types of tourists that visit Hillsborough by providing information, creative marketing, consistent communications, and interesting arts, music, outdoor, and cultural events.
- Market Hillsborough as a beautiful and charming small town with a long, rich history, vibrant art and music scene, great outdoor recreation opportunities, and delicious food and beverage.

As stated above, having knowledgeable, personable, and passionate staff is crucial for a positive visitor experience. Visitors who have a positive experience are more likely to return or recommend the Museum as a tourist destination to their friends and family, thus growing the tourism base. Staff is also responsible for all

marketing. Having staff that can produce effective marketing materials (as well as the exciting events and programming they are marketing) is vital.

Alternatives & impact if request is not funded:

If the request is not funded, staff wages will not receive an increase unless we can raise additional funds through fundraising, which will be a priority for FY25

Additional information:

Include any pertinent information that wasn't already covered about the request.

**Hillsborough Tourism Board**  
**FY25 -Draft Budget Report**

Tourism Board		FY23 Estimates	FY24 Estimates	FY25 Draft Budget
Revenues	F&B TAX	400,000	425,000	485,000
Expenses	C.S./VISITORS CENTER (ALLIANCE)	200,000	229,170	?
Expenses	C.S./OTHER	110,192	179,600	
	Burwell School Visitor Services \$40,574 (FY23)		Burwell School Visitor Services \$85,000 (FY24)	?
	OCHM Visitor Services \$46,100 (FY23)		OCHM Visitor Services \$56,100 (FY24)	?
	HAC Events & Visitor Services \$23,518 (FY23)		HAC Events & Visitor Services \$28,500 (FY24)	?
			Holiday Parade & Tree Lighting \$10,000(FY24)	?
Expenses	C.S./TOWN OF HILLSBOROUGH	38,422	26,000	26,000
Expenses	6% TOWN TAX ADMIN FEE	24,000	25,500	29,100
Expenses	MISCELLANEOUS	2,866	3,000	3,000
Expenses	GRANTS EXPENSE	14,500	13,500	20,000
	Art on the Hills Arts Fest \$7,500		HAC Solstice Lantern Walk (\$10,000)	
	HAC Solstice Lantern Walk \$7,000		Historic Eagle Lodge (\$3,500)	
Expenses	SPECIAL PROJECTS/PARTNERSHIPS	13,500		
	BioDock Project (FY20) \$3,500		0	
			Revolutionary War Interpretive Sign (2)	6,000
			Kayak Rental Pilot Program	9,000
	Unassigned (\$10,000)		0	
Expenses	AUDIT FEES	10,300	10,500	10,500
Expenses	DATA PROCESSING SERVICES	4,500	4,500	4,500
Expenses	TRAINING/CONF./CONV.	2,300	2,500	2,500
Expenses	INSURANCE	980	980	1200
Expenses	ATTORNEY FEES	500	300	300
Expenses	ADVERTISING	275	275	275
Total Expenses		422,335	510,825	112,375
Revenues Less Expenses			(85,824.98)	372,625.00
			Fund Balance	417,131